REGION OPERATIONS ADMINISTRATION MANUAL

© R.J. Reynolds Tobacco Company 1993

51846 6670

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

NOTICE

This document contains proprietary information which is the exclusive property of R.J. Reynolds Tobacco Company. All rights are reserved. No part of this document may be reproduced in any manner without the express written permission of R.J. Reynolds Tobacco Company.

YOUR RESPONSIBILITIES

This user guide is provided as a tool. All information contained in and related to this material is confidential and the sole property of R.J. Reynolds Tobacco Company. As a user, it is your responsibility to safeguard the confidentiality of this data and all support materials. The following measures should be strictly adhered to at all times:

- Passwords should never be shared.
- A terminal/personal computer engaged in active access to the system should never be left unattended; prior to leaving the location of an active access device, log off the application.
- All documentation, user manuals, etc., should be stored in an appropriately secure location.

51846 6671

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK I:
REGION SETUP

CHAPTER 1: PRELIMINARY SETUP PROCEDURES 1-1

Preliminary Setup Checklist 1-1

CHAPTER 2: OPERATIONS UNIT COORDINATOR POSITIONS 2-1

Summary 2-1

Organizational Chart 2-2

Job Descriptions 2-3

Region Operations Manager 2-4

Promotion Coordinator 2-5

Materials Coordinator 2-6

Personnel & Administration Coordinator 2-7

Systems Coordinator 2-8

CHAPTER 3: COMMUNICATIONS 3-1

Summary 3-1

Operations Office Update (letter) 3-2

Promotion Coordinator (PRC) 3-3

Materials Coordinator (MC) 3-5

Personel & Administration Coordinator (PC) 3-7

Systems Coordinator (SC) 3-8

Additional Steps 3-8

Examples of Correspondence 3-9

Expense Reports 3-9

Biweekly Labor Reporting 3-10

Expense Codes and Descriptions 3-12

51846 6672

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Voice Mail 3-14
New Region Operations Telephone Numbers 3-17
Pre-book Policy 3-18
Morale 3-20
Reporting Payroll Hours 3-21
Part-Time Labor Reporting 3-22
Administrative Supply Request 3-23
Package Contracts 3-24
Coupon/VPR Policy 3-28
Pay Register 3-32

BOOK II:
PROMOTION COORDINATOR

CHAPTER 1: COORDINATING THE WORKPLAN 1-1
Workplan Flow 1-1
Terms and Definitions 1-1
Obtaining Initial Workplan Information 1-4
SMS Report 806 1-4
SMS Report 570 1-9
Developing the Workplan Book 1-11
Promotion Sheet 1-12
Allocating Promotions 1-14
Obtaining NMI Report 1-14
CHAPTER 2: COORDINATING VALUE-ADDED PROGRAMS 2-1
Preliminary Activities 2-1
Procedures 2-1

51846 6673

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VAP Scroll List Details.. 2-2

Value-Added Transfer.. 2-6

CHAPTER 3: ORDERING BSGSFs.. 3-1

Preliminary Activities.. 3-1

Procedures.. 3-1

USING PROMOTIONAL PRODUCT ALLOCATION SCREENS.......... 3-2

Allocation by Sales Level.. 3-5

Inquiry by Account Number.. 3-9

Transfer Allocations.. 3-11

Direct Allocations Inquiry by Promotion.. 3-14

Placing Orders.. 3-16

CHAPTER 4: ORDERING PREMIUMS.. 4-1

Preliminary Activities.. 4-1

Task Overview.. 4-1

Function 402.. 4-1

Summary of Process.. 4-4

Category Order.. 4-6

Forms/Items Order.. 4-15

Promotion Order.. 4-18

Copy Existing Order.. 4-21

Bulk Ordering.. 4-22

Function 422.. 4-22

Procedure.. 4-22

Summary of Process.. 4-24

Forms/Items Order.. 4-25

Function 425.. 4-27

Procedure.. 4-27

51846 6674

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Forms/Items Order 4-31
Function 555 4-35
Procedure 4-35
Add Locator 4-37
Delete Locator 4-40
Change Locator 4-41
Delete Entries in Locator (Batch) 4-47
Display Locator 4-49
Display Invalid Entries in Locator 4-50
View Creation Criteria of Locator 4-51
Merge Locator Lists 4-52
Merge Locator Lists (Batch) 4-53
Print Locator Lists (Batch) 4-54
CHAPTER 5: OTHER PROCEDURES 5-1
Staging Orders 5-1
Troubleshooting Premiums 5-1
Handling Incremental Promotional Programs 5-1
Utilizing Leftover Premiums 5-2
Function 508 5-2
Function 524 5-3
Tracking/Monitoring Full-Price Promotions 5-5
Coordinating POS/PDI 5-5
Maintaining Goals 5-5
Troubleshooting Additional Problem Areas 5-5
CHAPTER 6: ORDERING COUPONS 6-1
Summary 6-1
Procedures 6-1

51846 6675

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 524 6-2
Ordering Coupons Via SMS Function 402 6-5
Summary of Process 6-8
Category Order 6-10
Forms/Items Order 6-19
Promotion Order 6-22
Copy Existing Order 6-26
Function 508 6-27
Printing Coupons 6-28
CHAPTER 7: MANAGING BACKROOM INVENTORIES 7-1
Summary 7-1
Function 125 7-1
Issuing Coupons and Updating Goals 7-3
Transferring Coupons to Another Employee 7-10
CHAPTER 8: OTHER CMS PROCEDURES 8-1
Reconciling Coupon Inventories 8-1
Returning Active Coupons to W-S 8-2
Returning Obsolete Coupons to W-S 8-2
Returning Active Coupons Via CMS 8-3
CMS Reports 8-6
Report Description and Request Parameters 8-6
Requesting Summary and Detail Reports 8-6
Requesting Reconciliation Reports 8-8
CHAPTER 9: UTILIZING THE COUPON PRINTER 9-1
Summary 9-1
Hardware Components 9-1
Operating Procedures 9-2

51846 6676

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Phase 2 Software Overview 9-2
Account Selection 9-3
Print Coupons 9-4
Report Displays 9-5
Report Coupons/Premiums 9-5
Report POS 9-6
Payment Verification/Draft Procedures 9-6
End Call 9-6
Communication 9-6
Modem Hookup 9-6
Daily Communications 9-7
Coupon Printer 9-8
Battery Maintenance 9-9
Cleaning the Print Head 9-10
Memory Card Trays 9-10
Troubleshooting 9-10
Help Desk Support 9-10

BOOK III:
MATERIALS COORDINATOR

CHAPTER 1: PRELIMINERY SMS FUNCTION OVERVIEW 1-1
Summary 1-1
Function 402 - Order Entry 1-1
Procedures 1-1
Summary of Process 1-3
Category Order 1-5

51846 6677

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Forms/Items Order........ 1-14
Promotion Order........ 1-17
Copy Existing Order........ 1-21
Function 404 - Order Inquiry or Retrieval........ 1-21
Procedures........ 1-21
Summary of Process........ 1-24
Examples: Specifying Inquiries and Options........ 1-28
Modifying or Canceling an Order........ 1-35
Function 405 - List of Materials........ 1-37
Function 406 - Order/Item Inquiry #2........ 1-41
Function 508 - Allocation Search by Item........ 1-42
Function 509 - Allocation Transfer........ 1-43
Function 524 - Allocation Report by Sales Level........ 1-44
CHAPTER 2: ORDER/MONITOR FIXTURES........ 2-1
Preliminary Notes........ 2-1
Procedures........ 2-1
CHAPTER 3: MANAGING BACKROOM INVENTORIES........ 3-1
Summary........ 3-1
Shipping Guidelines (Incoming/Outgoing)........ 3-1
Troubleshooting Shipment Problems........ 3-5
CHAPTER 4: SCHEDULING INSTALLATIONS........ 4-1
Preliminary Activities........ 4-1
Procedures........ 4-1
Tracking Installation Efficiency........ 4-1
Procedures........ 4-2
CHAPTER 5: FIELD SUPPLY REQUESTS........ 5-1
Summary........ 5-1

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Procedures.......... 5-1

CHAPTER 6: MANAGING FIXTURE REFURBISHING.......... 6-1

Summary.......... 6-1

Procedures.......... 6-1

CHAPTER 7: SUPERVISING GENERAL SALES WORKERS.......... 7-1

Summary.......... 7-1

Supervision of Outside Merchandising Specialists.......... 7-1

Supervision of Backroom Personnel.......... 7-1

CHAPTER 8: OFFICE SUPPLIES AND HANDHELD COMPUTERS.......... 8-1

Maintaining Office Supplies.......... 8-1

Tracking Handheld Computers.......... 8-1

Problems With Handheld Component Parts.......... 8-1

CHAPTER 9: VEHICLE ADMINISTRATION.......... 9-1

Summary.......... 9-1

Inquiry by Division.......... 9-1

Inquiry by Vehicle.......... 9-5

Inquiry by Status Code.......... 9 -6

Status Code Definitions.......... 9-6

Changing Vehicle Assignment.......... 9-7

New Vehicle (Prespec) Description.......... 9-9

Printing Prespec Vehicle Descriptions.......... 9-12

Requisitioning a Vehicle.......... 9-12

Entering a Requisition.......... 9-13

Canceling a Requisition.......... 9-14

Changing a Requisition.......... 9-15

Requisition Inquiry.......... 9-17

Printing a Requisition.......... 9-17

51846 6679

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Assigning Driver to New Vehicle.................................. 9-18

Special Accessories.. 9-20

Adding a Note.. 9-20

Note Inquiry.. 9-21

Automobile Accident Procedures................................ 9-22

Reporting an Accident.. 9-22

Repair Instructions.. 9-24

Insurance Cards.. 9-24

Summons, Subpoena.. 9-25

Employee Agreement.. 9-25

Registration and Title.. 9-25

Renewing License for Leased Vehicles...................... 9-25

Transferring Vehicles.. 9-26

Disposal of Company Vehicles.................................. 9-26

Unpurchased Vehicles.. 9-26

Employee/Third-party Purchase............................ 9-26

Surplus.. 9-27

Glass Breakage.. 9-27

Alarm Repair.. 9-27

Job Codes.. 9-27

Fleet Operations Contacts.. 9-27

Biweekly Expense Report for New Vehicle................ 9-27

51846 6680

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK IV:
PERSONNEL & ADMINISTRATION COORDINATOR

CHAPTER 1: APPLICATION PROCESSING 1-1

Summary 1-1

Phone Calls Requesting Application 1-1

Receiving Resumes 1-1

Employee References 1-1

Application Flow Tally 1-1

Interviewing 1-2

CHAPTER 2: PERSONNEL SYSTEMS 2-1

Summary 2-1

PDS System Access Procedures 2-1

Logon Procedures 2-1

Logoff Procedures 2-4

Navigating Around PDS 2-4

Issuing and Approving Reprimands 2-7

Accessing Reprimand Screen 2-7

Locating Employee's Social Security or Account Number 2-9

Creating a New Reprimand 2-11

Inquiring About an Existing Reprimand 2-20

Approving a Reprimand 2-29

New Hire Administration 2-30

Processing New Hires 2-30

Adding a New Hire 2-33

Processing Rehired Employees 2-50

51846 6681

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PAF and HRIS Maintenance 2-62
Making Status Changes 2-63
Making Other Changes 2-82
Entering Addresses - Do's and Don'ts 2-85
Emergency Contacts - Do's and Don'ts 2-85
Balancing Transactions 2-86
Requesting PAFs 2-86
Entering Sales Bonus Information 2-89
Prorating an Employee Account 2-93
Employee Job Change 2-94
CHAPTER 3: FIELD SALES OPERATING FUNDS 3-1
Summary 3-1
New Funds/Increase to Current Funds 3-1
Transfer of Funds 3-5
Fund Reduction 3-9
Confirming Fund Balances 3-13
Fund Shortages at Termination 3-13
Jobber Agreement Form 3-13
Handling Break-ins/Uncollected Bill-throughs 3-17
Cigarette Excise Tax Increases 3-21
CHAPTER 4: COMMUNICATIONS 4-1
Summary 4-1
General Telephone Etiquette 4-1
Fielding Complaints 4-1
Calls to Home Office in Winston-Salem 4-1
Handling Claims 4-17
Voice Mail 4-17

51846 6682

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Using InfoMail.. 4-17

Quick Reference Summary.................................. 4-18

CHAPTER 5: TRAVEL ARRANGEMENTS............................ 5-1

Preliminary Activities.................................... 5-1

Utilizing American Express Business Travel................ 5-1

Making Travel Arrangements Directly With Hotels........... 5-2

CHAPTER 6: MEETING ARRANGEMENTS........................... 6-1

Preliminary Activities.................................... 6-1

Making Meeting Arrangements............................... 6-1

Making Meeting Books...................................... 6-1

CHAPTER 7: CORRESPONDENCE................................. 7-1

Preliminary Procedures.................................... 7-1

Sorting Incoming Mail..................................... 7-4

Sending Mail.. 7-5

Document Transporters (DTs)............................... 7-5

Receiving Incoming DTs.................................... 7-5

Sending DTs... 7-6

Electronic Mail... 7-7

General Information....................................... 7-7

Accessing Electronic Mail................................. 7-8

Exiting Electronic Mail................................... 7-8

Receiving Mail.. 7-9

Printing Mail... 7-9

Sending a Document.. 7-10

Addressing Mail... 7-11

Status 7-12

File Cabinet.. 7-13

51846 6683

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Distribution Lists.......... 7-14

Sending a Message.......... 7-15

Sending a Note.......... 7-15

Electronic Mail Directory.......... 7-16

Electronic Mail User Defaults.......... 7-19

Faxes 7-29

Receiving Faxes.......... 7-29

Sending Faxes.......... 7-29

CHAPTER 8: TEMPORARY PAYMENT SYSTEM.......... 8-1

VOUCHERS (TEMPORARY PAYMENT SYSTEM).......... 8-1

Summary.......... 8-1

Office Expenses.......... 8-1

Creation of an Account for a New Vendor.......... 8-1

Vendor Account Update.......... 8-6

Account Deletions.......... 8-8

Office Expense Payment System.......... 8-8

Invoice Payment Procedures.......... 8-9

BOOK V:
SYSTEMS COORDINATOR

CHAPTER 1: PAYMENT SYSTEMS.......... 1-1

DRAFTS.......... 1-1

Summary.......... 1-1

Ordering Draft Books.......... 1-1

Receiving Draft Books.......... 1-1

Issuing Draft Books.......... 1-4

51846 6684

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Transferring Draft Books........ 1-10
Voiding Drafts/Draft Books........ 1-12
Disposition of Completed Drafts/Draft Books........ 1-14
Resolving Draft Errors........ 1-15
Errors........ 1-19
Removals........ 1-20
Error Messages........ 1-20
General Notes........ 1-24
VOUCHERS (TEMPORARY DISPLAY PAYMENTS)........ 1-26
Summary........ 1-26
General Guidelines........ 1-26
Obtaining Proper Documentation........ 1-26
Requesting Vouchers........ 1-31
Distributor Assist/VAPs........ 1-36
Obtaining Proper Documentation (VAP/DAP)........ 1-37
Requesting VAP/DAP Payments........ 1-37
MERCHANDISER BONUS PAYMENTS........ 1-47
Requesting Bonus Payments Via TPS........ 1-47
Tracking Contracts........ 1-50
CHAPTER 2: PAY REGISTERS........ 2-1
Summary........ 2-1
Preliminary Activities........ 2-1
Adjusting Pay Chain Registers........ 2-6
Adjusting INFO Section........ 2-9
Add Option........ 2-10
Search Option........ 2-10
Delete Option........ 2-11

51846 6685

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Special Check Handling.. 2-11
Payment Detail Section.. 2-12
Add Option.. 2-12
Change Option.. 2-12
Delete Option.. 2-13
Pay Register Approval for Chain Accounts Under Division Responsibility.. 2-13
Pay Register Adjustments for Independent Accounts.................. 2-14
ACCOUNT INFO Section.. 2-14
Add Option.. 2-15
Search Option.. 2-15
Delete Option.. 2-16
PAYMENT DETAIL Section.. 2-16
Add Option.. 2-16
Change Option.. 2-17
Delete Option.. 2-17
Pay Register Approval for Independent Accounts.................... 2-17
Approve Option.. 2-17
Final Pay Register.. 2-18
TROUBLESHOOTING.. 2-18
Unapproving Quarterly Payments Report........................ 2-18
Unapproving Preliminary Pay Register.......................... 2-18
Problems With RJRT Checks.. 2-18
Lost or Missing Checks.. 2-18
Stolen Checks.. 2-19
Stop Payment.. 2-19
Undeliverable or Returned Checks.............................. 2-19
Exception Payments.. 2-19

51846 6686

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Overpayments.. 2-19

Pay Register Historical Reporting.. 2-20

VENDING PAY REGISTERS.. 2-20

Adjusting Vending Pay Register.. 2-47

Chain/Corporate Vendors and Branches.. 2-47

Additional Reports.. 2-48

CHAPTER 3: REQUESTING REPORTS.. 3-1

Summary.. 3-1

Preliminary Activities.. 3-1

Master List Utilities.. 3-1

Obtaining Scroll Lists.. 3-2

Master List Account Selection.. 3-4

List of Direct Accounts.. 3-4

List of Retail Accounts Currently Participating in Specific VAP Program.. 3-6

M10 - Select by Contract.. 3-8

M11 - Accounts Called On/Not Called On.. 3-9

M12 - Selection by Merchandisers.. 3-10

M13 - List Brand by Distribution.. 3-11

M14 - Master List Call by Classification.. 3-12

M16 - Selection by Account Market.. 3-14

M17 - Master List by Volume.. 3-15

M03 - Account Scroll.. 3-16

M31 - View/Update Standard Account Information.. 3-18

M34 - Account Calls Made by Month.. 3-21

M35 - View/Update Contracts.. 3-22

M37 - View/Update Merchandiser/Account Marketing.. 3-24

M38 - View/Update Temporary Displays.. 3-26

51846 6687

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M70 - Print Report Menu.. 3-27
Account Coverage Report.. 3-29
Temporary Display Detail Report.. 3-30
Contract Lookup by Rows.. 3-32
Temporary Display Summaries.. 3-34
Report Formatting.. 3-35
Merch/Acct Mkt Summaries.. 3-37
Contract Summaries.. 3-38
Standard Master List.. 3-39
VAP Account Scroll List Detail.. 3-40
Scroll Master List.. 3-42
Activity Summary.. 3-43
VAP Account Scroll List Summary.. 3-46
Account Recap.. 3-48
Brand Distribution Report.. 3-49
Account Labels.. 3-50
Account Specific Profile.. 3-51
Print Reports.. 3-53
Historical Report Selection Menu.. 3-59
Contract Payment by Account Number.. 3-60
Contract Payment - Alphabetical.. 3-61
Contract Payment by Chain Accounts.. 3-62
Warehouse Product List.. 3-63
Retail Account Coverage.. 3-64
Daily Sales Rep.. 3-65
Contract Summaries Report.. 3-66
Master Account List.. 3-67

51846 6688

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Coupon Management............ 3-68
Merch/Acct Market............ 3-70
Address Labels............ 3-70
Management Summaries............ 3-73
CHAPTER 4: 7101 ENTRY............ 4-1
Summary............ 4-1
Preliminary Notes............ 4-1
IRS Requirements............ 4-1
Standard Account Screen Directions............ 4-2
Creating New Account............ 4-3
Deleting Account............ 4-9
Changing Account............ 4-14
Adjusting Contracts............ 4-17
M35 - View/Update Contracts............ 4-18
7101 Errors............ 4-20
CHAPTER 5: LABOR REPORTING............ 5-1
Summary............ 5-1
Part-Time Labor Reporting............ 5-1
Reporting of Full-Time and Part-Time Labor Hours............ 5-3
Procedures............ 5-3
How to Use LRS............ 5-4
T&A Codes - Regular Employees............ 5-9
T&A Codes - Part-Time Employees............ 5-10
CHAPTER 6: EXPENSE REPORTS............ 6-1
Preliminary Notes............ 6-1
Processing Expense Reports............ 6-1
Accessing SES............ 6-2

51846 6689

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Start a Batch 6-4
Restart a Batch 6-7
Delete a Batch 6-8
Print a Batch 6-9
Approve a Batch for Payment 6-10
Change an Expense Report 6-11
Delete an Expense Report 6-14
View/Print Expense Report 6-15
Expense Code Inquiry 6-16
Analysis Code Inquiry 6-18
Car Master Screen 6-19
Field Personnel Payment History 6-20
Batch Control Inquiry 6-25
Employee Master Inquiry 6-27
Field Personnel Mileage History 6-29

51846 6690

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6691

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK I: REGION SETUP

51846 6692

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK I

REGION SETUP

PROCEDURES

© R.J. Reynolds Tobacco Company 1993

51846 6693

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK I:
REGION SETUP

The Region Operations Unit is designed to coordinate and handle the administrative tasks normally undertaken by Sales Representatives and Management. Because this centralization is both physical, as well as organizational, superior planning and foresight are required to initiate the Operations Unit as efficiently as possible.

The most important step in bringing an Operations Unit up and running is the initial power-up. If logistical issues are handled expeditiously and effectively, the Operations Unit can get on-line more quickly, resulting in quicker improvements in efficiency and, just as importantly, reduced frustration for the parties this centralization is intended to benefit.

CHAPTER 1: PRELIMINARY SETUP PROCEDURES.................... 1-1

Preliminary Setup Checklist.. 1-1

CHAPTER 2: OPERATIONS UNIT COORDINATOR POSITIONS....... 2-1

Summary.. 2-1

Organizational Chart.. 2-2

Job Descriptions... 2-3

Region Operations Manager.................................... 2-4

Promotion Coordinator.. 2-5

Materials Coordinator... 2-6

Personnel & Administration Coordinator......................... 2-7

Systems Coordinator.. 2-8

CHAPTER 3: COMMUNICATIONS.................................. 3-1

Summary.. 3-1

Operations Office Update (letter)................................ 3-2

Promotion Coordinator (PRC)...................................... 3-3

Materials Coordinator (MC)....................................... 3-5

Personel & Administration Coordinator (PC)....................... 3-7

Systems Coordinator (SC)... 3-8

51846 6694

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Additional Steps.. 3-8
Examples of Correspondence.. 3-9
Expense Reports.. 3-9
Biweekly Labor Reporting... 3-10
Expense Codes and Descriptions... 3-12
Voice Mail... 3-14
New Region Operations Telephone Numbers................................ 3-17
Pre-book Policy.. 3-18
Morale... 3-20
Reporting Payroll Hours.. 3-21
Part-Time Labor Reporting.. 3-22
Administrative Supply Request.. 3-23
Package Contracts.. 3-24
Coupon/VPR Policy.. 3-28
Pay Register... 3-32

51846 6695

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER I
Preliminary Setup Procedures

51846 6696

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PRELIMINARY SETUP PROCEDURES

Preliminary Setup Checklist

1. Determine where the unit will be located and assign workstations for each coordinator.
2. Contact Frank Jordan (Winston-Salem ext. 7908) to implement each of the following:
   - Evaluate computer hardware needs and secure proper equipment. A terminal, monitor, printer, keyboard, and mouse should be placed at the workstations of each Coordinator and the Region Operations Manager. Ensure the proper hardware is installed.
   - Ensure all Coordinators have a password and Regional access to appropriate computer systems.
   - Assign printer destinations to all Coordinators and the Region Operations Manager (i.e., 63PA for Region Operations Manager in Region 6300). Coordinate port setup.
   - Reroute Division/District Documentation Transfers (DTs) and E-mail to print at the Region Operations Unit.
3. Secure appropriate furniture to include desks, tables, bookshelves, chairs, office dividers, file cabinets, etc.
4. Winston-Salem will hire an an outside contractor and oversee the running of computer cables to Coordinator and Region Operations Manager workstations.
5. Set up mail room to include copier, fax, postage meter, stackable mail boxes arranged vertically by Division, computer terminal, and printer.
6. Purchase answering machines for part-tim (P/T) employees to call in weekly hours and mileage. Coordinate with Keith Bess - AT&T National Accounts - RJR 1-800-443-4712 for the installation of 1-800 phone lines to be connected with the answering machine.
7. Contact phone company to install additional lines if necessary. Set up phone system so each Coordinator has a line that rings at his or her workstation. General lines for the Region Operations Manager should be routed through the Personnel & Administration Coordinator. Contact Keith Bess - AT&T National accounts - RJRT 1-800-443-4712.
8. Set up all full-time and selected part-time personnel on RJRT Voice-Mail system. RJRT contact is Mary Reavis (WS ext. 2811).
9. Secure coupon printer and roller to handle important competitive situations at retail. RJRT contact is Chris Minner (WS ext. 3745).
10. Build employee list to include all managers, sales representative, and Sales Representative - Temporaries (SRTs) by Division.

51846 6697

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

11. Request mailing labels for all employees who will receive mail. Place in stackable mailboxes.

12. Set up master mail book to include all territories to receive chain mailings. Book should include any chains that interact with Region.

13. Set up Operations Division Department Number (i.e., 6310). Contact ~~Joannette Cornelius~~ (W-S ext. 7597).

14. Schedule training sessions for Coordinators with Winston-Salem personnel.

15. Establish ship-to list for all representatives for coupons, premiums, Buy-Some-Get-Some-Free (BSGSF) Point-of-Sale (POS), supplies, etc.

16. Set up list of all chains that interact with the Region to include RJRT Chain Account Managers, Special Account Manager, Chain IDs, and affected Divisions.

17. Develop listing of all Direct Accounts which interact with the Region to include returned goods policy, value-added, distributor assist, bill-through policy, pre-book policy, and black-and-white/private-label (BW/PL) brands carried.

18. Prepare a list of expense codes for Sales Representatives and managers

19. Prepare a supply of envelopes and labels for Sales Representatives and managers.

51846 6698

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 2
Operations Unit Coordinator Positions

51846 6699

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

OPERATIONS UNIT COORDINATOR POSITIONS

Summary

In the initial tests of the Region Operations concept, administrative personnel were organized around several key business processes.

The Region Operations Administration Manual is set up around the framework found on the following pages. When it becomes necessary to assign different duties to personnel other tha those indicated, the Region Operations Manager simply pulls the appropriate sections from the implementation book and inserts them into a coordinator-specific manual. The objective is for each coordinator to have ready access to a manual describing the how-to portion of each of his/her job accountabilities.

Review the following organization charts for an outline of recommended positions and tasks.

51846 6700

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/ybky0000

Region Manager

Region Operations Manager

Promotion Coordinator (PRC)

- Helps with/administers Workplan
- Coordinates VAP
- Handles allocations and transfers
- Implements promotions - orders premiums and BSGSF coupons, and troubleshoots and stages premiums
- Handles incremental promotions
- Runs out leftover promotions
- Tracks promotion execution
- Coordinates POS and advertising
- Oversees goal maintenance
- Manages coupons - orders, receives, reconciles coupon inventories
- Performs word processing and assists with outgoing mail
- Assists distributor
- Handles prebooking
- Assists with phones

Materials Coordinator (MC)

- Orders/monitors fixtures
- Manages fixture inventory
- Schedules installations
- Handles supply requests
- Manages mini-refurbishing
- Maintains appropriate files
- Manages warehouse
- Manages Vehicle Administration
- Assigns equipment - handhelds
- Maintains office supplies
- Coordinates POS/PDI (non-Workplan)

Personnel & Administration Coordinator (PC)

- Assists with main phones
- Manages general mail/FAX (sort, send, file)
- Handles applications
- Manages new hire paperwork
- Maintains PAF and HRIS
- Enters SIAP scores/data
- Administers Voice-Mail
- Makes travel arrangements
- Coordinates meetings
- Tracks administrative budgets
- Manages payables (TPS) - office payments
- Assists with word processing
- Makes meeting books
- Maintains appropriate files
- Is responsible for E-Mail communications
- Manages FSOF

Systems Coordinator (SC)

- Manages labor reporting
- Submits expense reports
- Oversees SIS reporting
- Reviews Pay Register
- Handles contract maintenance
- Performs 7101 entry
- Reviews Vending Pay Register
- Maintains appropriate files
- Manages drafts/vouchers
- Assists with typing/ correspondence
- Handles presentations - CAPS, Grossnet, PowerPoint

© R.J. Reynolds Tobacco Company 1993

51846 6701

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

OPERATIONS UNIT COORDINATOR PROCEDURES

Job Descriptions

Following are job descriptions of the Region Operations Manager and each Coordinator position. These descriptions outline:

- Job responsibilities
- Professional and managerial skills the Coordinator should possess
- Technical skill the Coordinator should possesss
- Business knowledge the Coordinator should possess
- Personal dimension/skills the Coordinator should possess

The selection process must be carefully thought out, weighing accountabilities of each position and the strengths and weaknesses of each candidate. These descriptions can be a very useful tool in the selection and training of new Coordinators.

51846 6702

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

REGION OPERATIONS MANAGER

Job Responsibilities	Professional/Managerial	Technical	Business	Personal Dimensions
	Communications, Field Relationships, Leadership, Interpersonal Knowledge & Skills	Functional Knowledge & Skills	Organization/Industry Knowledge & Skills	Attributes/ Interpersonal Skills
• Supervises Region Logistic and Administration Staff Coordinators - Merchandising - Coupon - Premium/promotion - Systems - Personnel • Plans/implements Region-level recruiting process • Manages personnel administration: - Succession planning records for Region - Bonus/PR process - Records - especially new hires • Manages communication link to employment practices • Coordinates training with Home Office • Manages financial review/loss prevention: - Drafts/vouchers - Coupons - Field Sales Operating Fund • Assists with budget preparation/analysis • Coordinates lease management: - Division Offices - Region Offices	• Delegation: Effectively delegates responsibilities and projects • Organizing: Schedules and coordinates work, sets priorities, establishes efficient work procedures to meet objectives • Planning: Sets goals and develops strategies and schedules for meeting these goals, anticipates obstacles and defines alternative strategies • Follow-through/Reliability: Demonstrates ability to complete projects on an agreed on and timely basis, willing to devote whatever time is necessary to complete job responsibilities • Listening: Demonstrates attention to and conveys understanding of comments or questions of others • Coaching and Developing: Evaluates employees, provides performance feedback, facilitates professional growth • Oral Communication: Speaks effectively one-to-one and in groups, makes effective presentations • Written Communication: Writes clearly and effectively using appropriate style, grammar, and tone in informal and formal business communication • Leadership, Style, and Influence: Takes charge and initiates actions, directs activities toward accomplishment of meaningful goals, commands attention and respect of others • Conflict Management: Brings conflict or dissent into the open and uses it productively to enhance quality of decisions, arrives at constructive solutions while maintaining positive working relationships	• Has working knowledge of and can use an office computer • Understands the use and application of: - SIS - SMS - SES - TPS - AIM - ASM - PAF - PDS - HRIS - MARLIN - Sales Personnel System - Business Information - SCP, Coupon Mgt System • Can analyze Region reports: - Distribution - Activity summaries - Domestic customer Analysis - Financial reports • Financial and Qualitative Analysis: Draws accurate conclusions from financial and numerical material, applies financial principles and numerical techniques to management problems • Problem Analysis and Decision Making: Identifies problems; recognizes symptoms, causes and alternative solutions; makes timely, sound decisions even under conditions of risk and uncertainty	• Field experience helpful but not required • Has working knowledge of: - Policy and Procedures - EEOC - RIS - HRIS - PDS - Coupon Tracking/ Redemption - Retail/Direct Accounts - Robinson Patman Act - Distribution channels - RJR/competitive brands • Is knowledgable of training programs: - SMART - MFM - ELMT • Understands and uses: - Business planning - Time management • Is knowledgable of Home Office contacts (who to call on what matters)	• Is detail oriented and organized • Is self-starter/self-directed • Personal Motivation: Displays a high energy level, works hard to get things done, seeks increased responsibility on the job • Openness to Change: Willing to promote and adapt to change, demonstrates commitment to the organization, wants to see the organization succeed, understands the effort required to make sustainable/meaningful change, willing to "break china" • Personal Adaptability: Responds appropriately and competently to the demands of work challenges when confronted with changes, ambiguity, and adversity or other pressures • Bias Toward Action: Demonstrates commitment to building a great enterprise, has a well-balanced sense of urgency, has a passion for making decisions and drives for results, has a healthy optimism for the business in believing any problem can be solved, has a "can-do" attitude, stimulates bias toward action in others • Interpersonal Skills: Develops and maintains smooth, cooperative working relationships with customers, peers, and superiors; shows awareness of and consideration for the opinions and feelings of others

© R.J. Reynolds Tobacco Company 1993

51846 6703

© R.J. Reynolds Tobacco Company 1993

PROMOTION COORDINATOR

Job Responsibilities	Professional/Managerial	Technical	Business	Personal Dimensions
	Communications, Field Relationships, Leadership, Interpersonal Knowledge & Skills	Functional Knowledge & Skills	Organization/Industry Knowledge & Skills	Attributes/ Interpersonal Skills
• Coordinates/oversees implementation of Workplan • Coordinates VAP • Allocates/transfers VAP • Orders BSGSF • Orders premiums • Stages premiums • Troubleshoots premiums • Handles incremental promotions • Runs out leftover premiums • Tracks promotion execution • Coordinates POS and advertising (Workplan) • Oversees goal maintenance • Maintains appropriate files • Orders coupons • Receives/issues coupons • Returns obsolete coupons • Reconciles coupon inventory • Assists with mail • Maintains appropriate files • May assist with administrative support duties (typing, DTs, etc.) • Assists distributor • Assists with phones	• Planning: Sets goals and develops strategies and schedules for meeting these goals • Follow-through/Reliability: Demonstrates ability to complete projects on an agreed on and timely basis, willing to devote whatever time is necessary to complete job responsibilities • Organizing: Schedules/coordinates work, sets priorities, establishes efficient work procedures to meet objectives • Is consistently punctual • Maintains professional image • Listening: Demonstrates attention to and conveys understanding of comments or questions of others	• Understands/can operate office computer and the following applications: - Sales Information System - Sales Materials System - Business Information - Spreadsheet (Excel) - Word Processing	• Understands and uses: - Time management • Has working knowledge of: - Workplan process - Direct Accounts and "contacts" (VAP) - Basic knowledge of marketplace • Knows accountabilities of: - DM - ARC - DR - AR	• Personal Motivation: Displays a high energy level, works hard to get things done, seeks increased responsibility on the job • Personal Adaptability: Responds appropriately and competently to the demands of work challenges when confronted with changes, ambiguity, and adversity or other pressures • Interpersonal skills: Develops and maintains smooth, cooperative working relationships with customers, peers, and superiors

51846 6704

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MATERIALS COORDINATOR

Job Responsibilities	Professional/Managerial	Technical	Business	Personal Dimensions
	Communications, Field Relationships, Leadership, Interpersonal Knowledge & Skills	Functional Knowledge & Skills	Organization/Industry Knowledge & Skills	Attributes/ Interpersonal Skills
• Manages refurbishing • Orders/monitors fixtures • Manages fixture inventory • Schedules installations (may include outside suppliers) • Processes supply requests • Maintains appropriate files • Can demonstrate building of fixtures, etc. • Maintains warehouse • Supervises: - Merchandising Specialists - General Sales Workers • Properly trains new part-time employees • Identifies potential part-time performance issues • Tracks handhelds/Poquets • Maintains office supplies • Manages Vehicle Administration • Coordinates POS-PDI (non-Workplan)	• Planning: Sets goals and develops strategies and schedules for meeting those goals • Follow-through/Reliability: Demonstrates ability to complete projects on an agreed on and timely basis, willing to devote whatever time is necessary to complete job responsibilities • Organizing: Schedules and coordinates work, sets priorities, establishes efficient work procedures to meet objectives • Is consistently punctual • Maintains professional image • Listening: Demonstrates attention to and conveys understanding of the comments or questions of others • Has good oral and written communication skills	• Understands/can operate office computer and the following applications: - Sales Information System - Sales Materials System - Hand-held messages - Voice-Mail	• Understands and uses: - Time management • Has working knowledge of: - Merchandising components	• Personal Motivation: Displays a high energy level, works hard to get things done, seeks increased responsibility on the job • Personal Adaptability: Responds appropriately and competently to the demands of work challenges when confronted with changes, ambiguity, and adversity or other pressures • Interpersonal skills: Develops and maintains smooth, cooperative working relationships with customers, peers, and superiors • Mechanical Skills: Is able to read directions, assemble fixtures, etc. • Has basic "tool" knowledge (hammer, screwdriver, drill, etc.)

© R.J. Reynolds Tobacco Company 1993

51846 6705

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

© R.J. Reynolds Tobacco Company 1993

PERSONNEL & ADMINISTRATION COORDINATOR

Job Responsibilities	Professional/Managerial	Technical	Business	Personal Dimensions
	Communications, Field Relationships, Leadership, Interpersonal Knowledge & Skills	Functional Knowledge & Skills	Organization/Industry Knowledge & Skills	Attributes/ Interpersonal Skills
• Handles applications • Processes new hire paperwork • Maintains PAF and HRIS • Enters SIAP data • Answers phone • Handles general mail/FAXes • Administers Voice-Mail • Handles TPS office payments • Manages Field Sales Operating Funds • Inputs/tracks budgets • Makes travel arrangements • Makes meeting books • Coordinates meetings • Maintains appropriate files • Is responsible for E-Mail communication • May assist with administrative duties (typing, DTs, etc.)	• Planning: Sets goals and develops strategies and schedules for meeting those goals • Follow-through/Reliability: Demonstrates ability to complete projects on an agreed on and timely basis, willing to devote whatever time is necessary to complete job responsibilities • Organizing: Schedules and coordinates work, sets priorities, establishes efficient work procedures to meet objectives • Telephone manners are professional, pleasant, and performed without wasted time • Oral and written communications are timely, concise, and clearly understood	• Understands/can operate office computer and the following applications: - Sales Information System - Personnel Data System - Labor Reporting System - Sales Expense System	• Understands and uses: - Time management • Understands: - Sales Department policies and procedures • Knows individual contacts (who to call on what matters) • HRIS • RIS Manual	• Personal Motivation: Displays a high energy level, works hard to get things done, seeks increased responsibility on the job • Personal Adaptability: Responds appropriately and competently to the demands of work challenges when confronted with changes, ambiguity, and adversity or other pressures • Interpersonal skills: Develops and maintains smooth, cooperative working relationships with customers, peers, and superiors

51846 6706

SYSTEMS COORDINATOR

Job Responsibilities	Professional/Managerial	Technical	Business	Personal Dimensions
	Communications, Field Relationships, Leadership, Interpersonal Knowledge & Skills	Functional Knowledge & Skills	Organization/Industry Knowledge & Skills	Attributes/ Interpersonal Skills
• Inputs labor reporting • Inputs expense reports • Oversees SIS reporting • Reviews Pay Register • Reviews Vending Pay Register • Performs 7101 entry • Maintains contracts • Handles SOM requests • Maintains appropriate files • May assist with administrative support duties (typing, DTs, etc.) • Manages drafts/vouchers • Handles presentations: - CAPS - Grossnet - Power-Point	• Planning: Sets goals and develops strategies and schedules for meeting those goals • Follow-through/Reliability: Demonstrates ability to complete projects on an agreed on and timely basis, willing to devote whatever time is necessary to complete job responsibilities • Organizing: Schedules and coordinates work, sets priorities, establishes efficient work procedures to meet objectives • Is consistently punctual • Maintains professional image • Listening: Demonstrates attention to and conveys understanding of the comments or questions of others	• Understands/can operate office computer and the following applications: - Sales Information System - Business Information - Temporary Payment Systems - Word - Excel	• Understands and uses: - Time management • Has working knowledge of: - Pay Registers - RJR contract entries and designations - Vehicle guidelines and "contacts," (Home Office, PH&H)	• Personal Motivation: Displays a high energy level, works hard to get things done, seeks increased responsibility on the job • Personal Adaptability: Responds appropriately and competently to the demands of work challenges when confronted with changes, ambiguity, and adversity or other pressures • Interpersonal skills: Develops and maintains smooth, cooperative working relationships with customers, peers, and superiors

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6708

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COMMUINICATIONS

Summary

A crucial and ongoing step in the successful implementation of a Region Operations Unit is to clearly, openly, and frequently communicate the operational details of new procedures and guidelines to all Region sales personnel.

In initial tests, a multitude of questions, concerns, and suggestions almost immediately descended on the Region Operations Unit. After a month of fielding these queries, the Unit issued an update of specific details regarding each position and the administrative procedures undertaken in each. This update was tremendously helpful to the field in reducing unnecessary confusion and maintaining a positive approach to the roll-out.

Included here are examples of documents sent to Region sales personnel. It is recommended this information be reviewed and updated to reflect specific Region policies and distributed to the field *as soon as possible*. Optimally, the field would receive these notes at the initial roll-out meeting.

51846 6709

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

To: Region Personnel

April 8, 1993

Subject: Operations Office Update

Ladies & Gentlemen:

The purpose of this letter is to provide you with information about the Operations Office. We've been up and running for about a month and many changes have occurred. This letter should help to answer some common questions and clarify some new procedures. Please share any appropriate information with P/T personnel.

Although this is not all inclusive, it should be a good communication starting point. Additional information regarding the Operations Office will be sent out as needed. Remember, we are here to provide support for you! Let us know how it's working and as always, any suggestions will be gladly accepted.

Sincerely,

Region Operations Manager

"We work for smokers"

51846 6710

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Promotion Coordinator (PRC)

- All Workplan promotions will be allocated and ordered by the Promotion Coordinator.
- Workplan promotions will be allocated based on National Promotion Indicators. Each territory will receive an allocation based on the percentage of the Division total for each program.
- Value-Added Direct Chains will be provided with the proper allocations of items; however, the appropriate Chain Account Manager (CAM) will continue to communicate with these accounts. The CAM may need to order promotional product or additional product to pack a promotion in order to comply with Direct Account (D/A) ordering procedures. Communication between the PRC and CAM will be critical. CAMs may wish to turn this function over to the Region Operations Office in the future.
- The PRC will be monitoring leftover Value-Added Program (VAP) promotions to assist in getting the promoted product to retail. Chains will receive priority.
- Workplan promotion-specific POS will be ordered and allocated along with premiums, coupons, and BSGSFs. This POS will be ordered directly to the home of the Sales Representative (SR) or to a storage area.
- A Workplan book will be mailed out to all Division Managers (DMs) and reps prior to down-the-street (DTS). This book will communicate the promotion description, a picture if available, allocations, and ship-to points for all programs. Hopefully, this information will be available 1 month prior to DTS on all programs.
- A copy of the Workplan book will be distributed to DMs for review and revision prior to ordering.
- Until a revised Value-Added indicator is established, the PP1, PP, and PP3 indicators will be used.
- All coupons will be ordered by the Promotion Coordinator to the appropriate SR's home or storage area.
- No coupons should be ordered to Division offices by management because of complications that will occur with the Coupon Management System. Any coupons shipped to Division offices will be ordered by employees to ensure proper tracking.
- Sales Representatives should anticipate and plan their coupon needs.
- Coupons should be requested via the new coupon requisition form.
- A coupon printer is located in the Region Operations Office to handle competitive situations that occur at retail. These printers are for handling exceptions, <u>not</u> everyday needs.

51846 6711

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- *Pre-books for Chains should be mailed to the appropriate Direct Account* from the Chain office. A copy of the authorization/pre-book should be mailed to the Region Operations Office for distribution to the appropriate Sales Representatives. This process should eliminate the double handling of paperwork associated with sold product and should speed up delivery to retail. All Value-Added authorizations should be directed to the Region Operations Office.

51846 6712

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Materials Coordinator (MC)

- All work orders should come to the Materials Coordinator for ordering.
- Ensure that work orders are filled out as completely as possible with the following:
  - Store volume
  - Chain ID - if independent, write IND
  - Diagram number
  - Profile
  - Security/Non-Security
  - Drawing of fixture (if needed)
- Work orders will be scheduled by the MC with a copy of the schedule going to all Region Operations Unit reps, Special Accounts Managers (SAMs), and CAMs.
- Travel will be limited to a 60-mile radius except for large merchandising sets.
- Scheduling the Merchandising Specialists outside the Region Operations Office will be done as directed by the local DM. Proper communication with the MC will be critical.
- Sales Representatives' supply requests will be filled and ordered by the MC — a new request form will be distributed in the near future. Indicate individual units or SKUs on all supply requests. Any items that are unavailable or backordered will be noted.
- Copies of completed Chain work orders will be forwarded to the appropriate SAM or CAM if completed by the Region Operations Unit Merchandising Specialists. Any work orders completed by a SR or outside MS should be sent to the MC and will be forwarded to the appropriate CAM or SAM. This way CAMs and SAMs will thus be informed of the status of their Chain.
- Voice-mail will be used to clarify any questions regarding work orders; however, be as clear as possible on the original work order.
- Master Store List (MSL) information will be used to clarify work order. MSL must be accurate.
- Fixtures removed from retail will be cleaned up and used for future requests whenever possible.
- New-style wood flex is now available and should be considered when selling fixtures - cost of wood flex is about one-half that of metal.
- Pre-built springfeds will be set by P/T if Plan-O-Gram is submitted.
- A new work order is being developed. Use the current work order to communicate needs until the new version is finalized.
- A significant number of work orders is being received via FAX. Although urgent material may need to be faxed periodically, faxing this material should

51846 6713

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

be the exception rather than the rule.

- A supply of handheld computers will be maintained in theRegion Operations Office. Reps should follow traditional guidelines and call for a replacement if directed to do so by the Help Desk.

51846 6714

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Personnel & Administration Coordinator (PC)

- Full-time recruiting, interviewing, and selection will be a part of the new operation. When an opening occurs, the DM will be supplied with several qualified candidate from which to make a final decision.
- Current applications will be maintained in the Operations Office. Anyone interested in working for RJRT full time should submit a resumé to the Region Operations Office. No applications should be distributed. Please use good judgment to determine whether an interested party is qualified.
- Part-time vacancies should be handled in the traditional manner. No part-time recruiting will be done in the Operations Office.
- New hire paperwork will be completed by the PC (if appropriate) to include part-time employees (metro Twin Cities only). An appointment should be set up with the PC for new P/T hires. In many instances, it will not be feasible for a new hire to travel to the Region Operations Office. In these cases, an RJRT manager or experienced sales rep may fill out employment papers. It will be the DM's responsibility to sign the paper prior to mailing.
- Check with the PC prior to committing to a start date for any new hire. Start dates must occur at the beginning of a pay period.
- All new hire paperwork should be directed to the Operations Office for entry. No paperwork should be directed to Winston-Salem.
- All Human Resources Information System (HRIS) information should include address, phone number, emergency contact, etc., and will be maintained on-line in the Operations Office. Any changes should be directed to the PC for updates.
- Any necessary travel arrangements at the Division level will be made by the PC.
- Meeting coordination will be handled by the PC.
- Mail will be sent to Sales Representatives once a week as a general guideline. Any urgent mail will be sent on immediately if necessary.
- Mail received in the office should be organized with similar items attached together (i.e., retail order receipts, jobber receipts, etc.).
- Mail forwarded to DMs will be marked if some action has been taken. The appropriate personnel will be copied for routine correspondence with a note of who was copied. Correspondence that is more sensitive or confidential will be forwarded directly to the DM and appropriate action as requested by the DM will be taken.
- General mail will be sent to the Region Operations and CAM offices daily.

51846 6715

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Systems Coordinator (SC)

- Any Sales Information System (SIS) reports that sales reps or managers would like to review should be requested from the SC. These reports will be sent only when requested — not automatically. If certain reports are being consistently requested, the DM will determine whether the report should be sent automatically.
- Drafts and vouchers will be handled by the SC.
- All 7101s and contract changes, additions, and deletions will be entered by the SC.
- All vending pay registers will be approved by the SC.
- Sales Rep Chain and Independent Quarterly Pay Registers will be approved by the SC. Cooperation in submitting changes prior to the cut-off date will be appreciated.
- Contracts, filed alphabetically, will be maintained in the Region Operations Office.
- Any presentations required at the Division level will be put together at the Operations Office. Good judgment should be used in determining whether a formal presentation is necessary.
- All expense reports should be submitted to the Region Operations Office for entry.
- Expense reports should arrive in the Region Operations Office on Monday. Any reports received after Wednesday's mail (A.M.) will be held and entered the next period. Please ensure all reports are complete and only submit a receipt if required.
- Any exceptions to a normal workday should be left on the SC's voice-mail to include vacation, illness, etc., on the day in question. This information should also be included in the expense report.
- Part-time hours should be called in on the appropriate answering machine line. A signed hours sheet should be submitted at the end of each 2-week period to include hours worked by day and mileage by day. An 800 number for these lines will soon be available.
- The Region guideline for P/T miles is 300 per week. Exceptions will be forwarded to the appropriate DM for review.

Additional Steps

Initial communication is not the final step in the communication process; ongoing and thorough communication must continually maintain the required level of understanding required if the Operations Unit is to succeed.

The following pages highlight correspondence sent to the field covering a wide ranges of topics. They are included for your review and use if needed.

51846 6716

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
T bacco Company

To: Green Bay Sales Representatives March 9, 1993

Subject: Region Operations Department

Ladies & Gentlemen:

You recently attended a meeting conducted by Wayne Tucker explaining the new Region Operations concept.

We are pleased to announce that we're ready to roll the Green Bay Division into the operation effective 3/15/93.

Please submit your expense reports and part-time hours to the Green Bay office for period ending 3/14/93. All future expense reports, work orders, 7101's, supply requests and any other materials previously sent to the Division office should be directed to the address listed below effective March 15:

Region Operations Office
6431 Cecilia Circle
Bloomington, MN 55439
Phone (612) 941-3466
Fax (612) 941-4906

Part-time employees should begin calling in their hours weekly beginning Friday March 19, 1993. We are in the process of establishing a voice mail system so further details regarding this procedure will follow.

The Region Operations Department was designed to reduce and streamline administrative efforts at all levels. We look forward to providing you with quality administrative support with minimal turn around time. Any suggestions or recommendations relative to improvements in our area will be gladly accepted.

Sincerely,

T.W. Goudreault
Region Operations Manager

cc: RLM
SSI
DWG
JS

"We work for smokers"

51846 6717

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds Tobacco Company

March 26, 1993

TO ALL FIELD SALES REPRESENTATIVES

SUBJECT: BIWEEKLY EXPENSE AND PAYROLL REPORTS AND LABOR REPORTING

Ladies & Gentlemen:

As you are aware, all Expense Reports are now being processed through the Region Operations Office.

Four Divisions/Districts sent reports this week. Green Bay will have theirs sent next pay period and Milwaukee the following pay period. This is a great amount to process and I need your cooperation. Following are some important guidelines:

- IMPORTANT - If you have worked less than a 40 hour week due to vacation, illness, etc. You MUST call these exceptions to the Systems Coordinator via voice mail. This is very important for the Labor reporting process. If the office gets the info from your expense report - it is "after the fact" and is time-consuming to update.
- Mail your report promptly - any reports received later than the Tuesday after the pay period (holidays being an exception), will have to be held over to the next pay period.
- Send in only the white copy and receipts - Also, if noted on Expense Report that a receipt is necessary if over $25.00 - DO NOT send in receipts under the $25.00 amount.
- Fill in ALL your totals, gallons of gas, dollar amounts, personal mileage, etc.

"We work for smokers"

51846 6718

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Ensure beginning and ending miles are entered.
- Please enter all the expense codes - I have attached a copy of the most used codes. If you have a questions on a code - call the Systems Coordinator at the Operations Office at (612) 941-6466.

Thank you for your cooperation with this important matter.

Sincerely,

T.W. Goudreault
Region Operations Manager

TWG:ch

Attachment

51846 6719

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

EXPENSE CODES AND DESCRIPTIONS

CODES	DESCRIPTIONS
102	Total Miles Driven
103	Personal Miles - Record Daily Usage
104	Gas Gallons - Per Purchase
106	Oil Quarts - Quantity Purchased
107	Commuting Mileage
210	Gasoline - Dollar amount of purchase
220	Oil - Dollar amount of purchase
231	Parking - amounts per day
232	Storage - Garage - Overnight storage of company vehicle - required approval
240	Wash per week - chargeable once per week
250	Lube, filters, etc. If purchased with an oil change, record quarts of oil to #106, with dollar amount charged to #220. Specify charge in explanation section.
270	Auto license - insert as needed on blank line under "wash" section
290	Misc vehicle expenses as needed. Specify charge in explanation sections i.e., washer fluid, headlamps, etc.
310	Lodging, while in travel status only. Receipt must show "zero balance" or credit card receipt attached. Specify date, night, etc. in explanation section.
320	Breakfast - yours only/travel
322	Lunch - yours only/travel
325	Dinner - yours only/travel
342	Telephone - pay phone or calls from home. Receipt required for charges over $5.00
343	Postage - stamps, UPS, Federal Express - Receipt if over $25.00

51846 6720

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

349	Sundry expense - tape, fixture cleaning supplies, etc. Call if questions on this area. Please report in the expl section what was purchased and receipts.
411	Temporary pack displays - for C&D calls.
439	Fixture hardware, materials, again, call if questions
540	Consumer offer

51846 6721

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

March 12,. 1993

To: Managers, Representatives, Support Staff

Subject: Voice Mail

Ladies & Gentlemen:

We have recently been added to the Winston-Salem voice mail system which will allows us to communicate with other employees throughout the Region.

This voice mail system has many benefits, some are listed below:

- Allows for faster turnaround time than current handheld message system.
- Strategical changes can be communicated to the entire Region or Division in one message which will guarantee that employees get the same information the same way.
- Allows for an immediate response to be sent back to an individual that sent you a message.
- Allows an individual that sent a message to see if it was picked up by the recipient.
- Will allow Sales Representative to communicate with each other to get information on S/R chains, bill thru's, transferring of supplies, etc.

The bottom line is that voice mail, if used properly, will allow us to communicate more efficiently with less turn around time. Written communication will also decrease.

The voice mail system will work very nicely in conjunction with our new Region Operations Office. On the next page are some examples of effective use.

"We work for smokers"

51846 6722

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Materials Coordinator Kevin Redding receives a work order requesting 3-4 ft security doors for diagram #110. Kevin notices that the doors requested do not match the diagram number and leaves the following message on voice mail "work order for Joe's Market requested 3-4 ft security doors however diagram numbers show that you need 4 3 ft doors. Which is correct?" S/R picks up message and responds to questions and the fixture is ordered.

S/R is moving and has new address information. Calls Personnel & Administration Coordinators mailbox and leaves the new address. Updates are handled.

DM sees heavy Cambridge couponing at the $4.00 level throughout the Division. Sends exact same message to all Division reps to immediately request $4.00 Doral coupons for anticipated needs. DM requests notification for personnel who do not pick up their messages within 24 hours and receives notification when picking up his/her messages.

These are just a few examples but the point is to request the exact information you need rather than saying "call me about the work order for Joe's Market."

Another key to this system working is that all personnel must check their voice mail at least once per day, preferably twice per day.

Attached is a reference guide on how to use voice mail. The first time you call, you'll enter your employee number & # when they ask for your password. You'll then enter your employee number and # again as your mailbox ID. Your employee number will be your permanent mailbox ID. You will have to establish a 5-8 digit password that is different than your employee number for future use. The online tutorial gives a thorough explanation of how to use the system. Please experiment.

Attached is an employee listing with account numbers. You will need these numbers to send messages to the appropriate mailbox/person.

In closing, it is extremely critical that people pick up their voice mail and respond to any messages for this to work successfully. Any messages relayed from customers should receive same day response without exception with personal contact within one week.

If you have any questions regarding voice mail, please call the InfoMail help line at 919-741-6840 or call me at the Operations Office.

Sincerely,

T.W. Goudreault
Region Operations Manager

51846 6723

© R.J. Reynolds Tobacco Company 1993

Div #	Employee	Mailbox	Div #	Employee	Mailbox
6300	David L. Wilmesher	47293	6326	David L. Smilden	51191
	Jay R. Loftin, Jr.	59752	1	Wade Oman	77489
	Roxanne A. Reaume	77986	2	Matt Pelphrey	78079
			3	Sally Oniskin	77948
6310	Tom W. Goudreault	69286	4	Kris Frank	830933
	Virjean Lindgren	67873	5	Mace Hershberger	77470
	Lynette Spiering	77676	6	Joe Hughesdon	71456
	Peter Battis	828972	7	Ted Anderson	65801
	Kevin Redding	827071	8	Joe Ademino	73235
			9	Michael Engel	78033
6322	Ron L. Moen	37667	10	Jay Luko	76335
	Dan W. Griffiths	72537	11	Tim Cleland	827634
	Sheldon S. Idso	66588	12	Jon Fleck	828381
	Julie A. Stindt	77666			
1	Jerry Glaze	343329	6328	Tom P. Burns	71824
2	James Hoyt	73784	1	Warren Steiner	75360
3	Rodney Metz	76821	2	Jim Mooreq	77197
4	Mary B. Jossart	77290	3	Kari Olson	77176
5	Cherrie Chaltron-Fenander	77888	4	Greg Bounds	72538
6	Ron Larson	40463	5	Brian Woiid	73103
			6	Phil Peterson	77319

Example of Voice Mail listings

51846 6724

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

March 25, 1993

D.L. Wilmesher
J.R. Loftin
Chain Account Managers
Division/District Managers
Field Sales Representatives

SUBJECT: NEW TELEPHONE NUMBERS - Region OPERATIONS OFFICE

Ladies & Gentlemen:

Following are the assigned telephone numbers:

(612) 941-3466	Main number - D.L. Smilden - Retail, etc.
(612) 941-3494	Roll-over number
(612) 941-4905	T.W. Goudreault
(612) 941-9247	Virjean Lindgren
(612) 941-9240	Lynette Spiering
(612) 941-8253	Peter Battis
(612) 941-9230	Kevin Redding
(612) 941-4906	Fax
(612) 941-8086	Answering machine for 6324, 6326, 6328 & 6330
(612) 941-9208	Answering machine for 6322 and 6332

Sincerely,

T.W. Goudreault

TWG:ch

cc: MWSA

"We work for smokers"

51846 6725

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
T bacco Company

March 2, 1993

Subject: PRE-BOOKS FOR DIRECT ACCOUNTS

Ladies & Gentlemen:

In an effort to reduce lag time in processing pre-books, effective immediately, please begin sending pre-books DIRECTLY to the Direct Accounts. The attached list provides the necessary information.

- Direct Account
- Address
- Direct Account personnel the pre-book should be addressed to the attention of

Please ensure all information is complete on the pre-books, i.e., line numbers, store number with direct account, etc.

This should reduce the time lag between taking the pre-book orders and delivery of product. Hopefully, this will help us sell more cigarettes more often!

Sincerely,

T.W. Goudreault

TWG:vl

Attachment

S-1

"We work for smokers"

51846 6726

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

DIRECT ACCOUNT INFORMATION FOR PRE-BOOKS

All accounts with * MUST have line numbers

AMUNDSON CIGAR & CANDY COMPANY
7856 12TH AVE SOUTH
BLOOMINGTON, MN 55420

BOYD HOUSER CANDY
307 NORTH WASHINGTON AVE
MINNEAPOLIS, MN 55401

*FAIRWAY FOODS
4567 WEST 80TH STREET
BLOOMINGTON, MN 55437
ATTENTION: SCOTT SAFFGREN

J.P. FRITZ COMPANY
HASTINGS AVENUE & HIGHWAY 61
NEWPORT, MN 55055
ATTENTION: CITY DESK

*R.E. FRITZ, INC.
8511 10TH AVE NORTH
MINNEAPOLIS, MN 55427

* GATEWAY FOODS
3501 MARSHALL ST NE
MINNEAPOLIS, MN 55418
ATTENTION: GLORIA LORD

* GATEWAY FOODS
HWY 30 EAST
BLOOMING PRAIRIE, MN 55917

51846 6727

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

March 10,. 1993

D.R. Baker
G.M. Palmer
M.S. Goring
D.L. Smilden
T.P. Burns
J.J. Girard
B.K. Hamilton
D.W. Fisher
L.A. Goranson

Ladies & Gentlemen:

Over the past few weeks we have obviously been reorganizing the operating function to support Division administrative functions. In my opinion, to date things are going well!

Also, over these couple of weeks I have heard numerous concerned comments, mostly dealing with little things. Remember, to make this type change we _must_ be cooperative and not picky.

The fact is, we can work through all areas of concern ***if we work together, be considerate, and ask for help versus demanding help.***

Sincerely,

D.L. Wilmesher

TWG:vl

"We work for smokers"

51846 6728

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
T bacco Company

March 19, 1993

TO ALL PART TIME PERSONNEL - DivisionS 6324, 6326, 6328 & 6330

SUBJECT: REPORTING OF PAYROLL HOURS

Ladies & Gentlemen:

Enclosed in this packet are time sheets, envelops and mailing labels for your use. Listed below are the guidelines to be followed:

- Call every week - Friday pm, Saturday or Sunday - make sure you call before 8:00 am on Monday.
- Call (612) 941-8086
- After the beep, slowly give your Division/District name and number

  Give your name, spell your name and then give the week ending, hours daily, Monday hours, Tuesday hours, etc.
- Give your total miles for the week. Guidelines for the area are a maximum of 300 miles per week. Please contact your Division/District Manager if there is to be an exception.
- Please DO NOT send any requests for drafts, labels, etc.
- Immediately after calling in your hours for the second week of the pay period, mail in your attached time sheet and mail in the special envelopes. This is mandatory.

If you have any questions, please call the Systems Coordinator at 941-3466.

Thank you for your cooperation in this important function.

Sincerely,

T.W. Goudreault

"We work for smokers"

51846 6729

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PART TIME - REPORT OF HOURS

Division # ____________

____
Employee Signature

Week Ending ____________		Week Ending ____________	
Monday	____	Monday	____
Tuesday	____	Tuesday	____
Wednesday	____	Wednesday	____
Thursday	____	Thursday	____
Friday	____	Friday	____
Saturday	____	Saturday	____
Sunday	____	Sunday	____
WEEK #1 TOTAL	____	WEEK #2 TOTAL	____

BIWEEKLY TOTAL # HOURS ____

BI-WEEKLY TOTAL # MILES ____

51846 6730

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ADMINISTRATIVE SUPPLY REQUEST

ATTN: LYNETTE

SALES REP ______________

DIV/REP# ______________

REC'D: ______________

ITEM	COMM#	#NEEDED
7101's	071019	______
ORDER BOOKS	237685	______
CASH RECEIPTS	070680	______
SALES COMM MEMO	pkg/25	______
CONTRACTS		
COUNTER PCD	071621	______
CCD	288795	______
EXTRA VALUE	173879	______
UPM	108605	______
EXP CHECKLANE	111982	______
SHELF SS1	073879	______
SCDP1 - SCDP2	373365	______
NSS-1	144223	______
ESS	388128	______
PREF PR CTR	148766	______
PREF PR CTN	388126	______
PREF PRES A	148766	______
PREF PRES AB	177377	______
PREF PRES AC	177322	______
PREF PRES ABC	177333	______

DRAFT BOOKS ______ $5.000 ______ $500 ______

DRAFT BOOK COVERS ______

ACCTS NOT CONTACTED ______

DISTRIBUTION ______

WHOLESALE DISTRIBU ______ D/A# ______

SCROLL LIST ______

MASTER LIST ______

MASTER LIST/TOP 25 ______

ACTIVITY REPORT QUARTER ______ MONTHLY ______

LINE NUMBERS ______ D/A# ______

ACCT'S W/NO TAX ID ______

RETURNED GOODS ______ D/A# ______

TEMP DISPLAY REPORT MONTH ______ CHAIN ID ______ PROMOTION ______

51846 6731

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PACKAGE CONTRACTS

Contract Type	Plan	Units	Req Vol	Payment	Requirements
UPM	3R	1	90-119	$50.00	Universal Package Merchandiser Plan
	3S	1	120+	$100.00	RJR Self Service Spring Load Package fixture with a promotional platform (dump bin) exclusively for RJR's use
ECD	1A	1	300-499	$70.00	Express Checkland Display
	1B	1	300-499	$50.00	RJR Self Service Spring Load
	2A	1	500+	$100.00	Package fixture with a promotional
	2B	1	500+	$80.00	platform exclusively for RJR located at the checkout area. A = Exclusive RJR B = Shared RJR/Others
CCD	CCD1	1	76-119	$21.00	Doral Continuous Counter Display
	CCD2	1	120+	$30.00	(prominent location) Doral self-service or non-self service counter display consisting of a minimum of 2 trays for product
EXTRA VALUE	EVD	1	76+	$15.00	Extra Value Counter Display Extra Tray added to CCD for Magna/Sterling brands and/or exclusive display for Magna/Sterling brands.
COUNTER PCD	2J	80 pk	40-99	$10.00	Permanent Counter Display
	2K	120pk	40-99	$18.00	(full price brands) Located
	3J	80 pk	100-169	$29.00	in the cash register position or
	3K	120 pk	100-169	$37.00	#1 position in the store
	3L	140 pk	100-169	$41.00	
	3M	160 pk	100-169	$43.00	
	4J	80 pk	170+	$35.00	
	4K	120 pk	170+	$44.00	
	4L	140 pk	170+	$46.00	
	4M	160 pk	170+	$49.00	
	2B	80 pk	40-99	$9.00	Permanent Counter Display (full
	2C	120 pk	40-99	$16.00	price brands) located within 3'
	3B	80 pk	100-169	$15.00	of the primary selling area.
	3C	120 pk	100-169	$21.00	
	3D	140 pk	100-169	$25.00	
	3E	160 pk	160 pk	$27.00	
	4B	60 pk	170+	$27.00	
	4C	120 pk	170+	$35.00	
	4D	140 pk	170+	$38.00	
	4E	160 pk	170+	$40.00	

51846 6732

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Contract Type	Plan	Units	Req Vol	Payment	Requirements
PREF PR CIR	3K3	1	100-169	$85.00	Preferred Presence Counter
	3L3	1	100-169	$95.00	Display Plan - RJR's PCD
	4K3	1	170+	$95.00	in cash register position,
	4L3	1	170_	$100.00	promotional platform or VAP displays, lighted sign (15 x 49 or 32 x 37), Winston reader board sign.
PREF PRES	AB	1	100-169	$35.00	Enhanced Preferred Presence
	AC	1	100-169	$50.00	AB = Enhanced lighted PCD, floor
	ABC	1	100-169	$85.00	display and overhead preferred
	4K1	1	170+	$129.00	presence sign
	4L1	1	170+	$131.00	AC = same with additional
	4M1	1	170+	$134.00	advertising ABC = same with a CCD, either self-service or NSS
SACON	A	1		$30.00	Savings Consolidation for Total Category Management. Supplemental package display consolidating subgeneric displays into one area.
FLOOR PFD	5A	1	700+	$40.00	Permanent Floor Display
	5C	1			(usually K-Mart)

51846 6733

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PACKAGE CONTRACTS

Contract Type	Plan	Units	Req Vol	Payment	Requirements
SHELF SS1	BXXXX	#rows	225-299	$1.00	Self Service One Carton Shelf
	CXXXX	#rows	300-499	$2.60	RJR products are displayed on the
	DXXXX	#rows	500+	$3.00	top 2 shelves of a self service carton fixture. Number of rows are calculated using these guidelines. 4' shelf = 13 rows 3' shelf = 9 rows 2.5' shelf = 8 rows
SHELF SS1-V	BXXXX	#rows	225-299	$1.00	Shelf Service 1-V Carton Shelf
	CXXXX	#rows	300-499	$2.60	Plan - RJR products are
	DXXXX	#rows	500+	$3.00	vertically loaded on either a PM or RJR self service carton fixture. Number of rows are calculated the same as above.
SCDP1	2X	1	200-499	$30.00	Savings Center Display Plan
	3X	1	500+	$40.00	(covers base of 16 rows)
	4X	1	500+	$64.00	RJR savings brands, except for
	5X	1	300-499	$30.00	Forsyth brands, occupying
	6X	1	500+	$64.00	a minimum of 16 rows on the top
	2Y	1	200-499	$20.00	two shelves of a RJR carton
	3Y	1	500+	$25.00	fixture
	4Y	1	500+	$35.00	
SCDP2	2XXXX	#rows	up to 24	$1.00	Savings Center Display Plan
	3XXXX	#rows	16-32	$2.00	(covers additional rows)
	4XXXX	#rows	up to 32	$2.00	RJR savings brands, except
	5XXXX	#rows	up to 48	$2.60	Forsyth brands, occupying more
	6XXXX	#rows	up to 48	$3.00	than 16 rows on the carton fixture. The number of plan rows is calculated by counting the number of savings rows above 16 rows.
SHELF NSS1	AXXXX	#rows	100-199	$0.35	Non Self Service Carton Shelf
	BXXXX	#rows	200-299	$0.45	Plan
	CXXXX	#rows	300-499	$0.75	
	DXXXX	#rows	500+	$1.25	
SHELF NSS2	EXXXX	#rows	300+	$1.50	NSS Carton Shelf Plan (add prom display)
	FXXXX	#rows	300+	$1.75	NSS Carton Shelf Plan (add signage)
	GXXXX	#rows	300+	$2.00	NSS Carton Self Plan (add again & promo)

51846 6734

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Contract Type	Plan	Units	Req Vol	Payment	Requirements
PREF PR CTN	3C 3D 3E	1 1 1	300+ 300+ 300+	$50.00 $75.00 $100.00	Preferred Presence Carton Display Plan - Bonus for having RJR carton contract, package contract, and savings contract. 3C = Unlighted Fixture 3D = One lighted fixture 3E = 1 or 2 lighted fixtures, lighted side sign, lighted clock, etc,
TCMS	SS NSS	1 1		$1 to $150	Total Category Management (supermarket only) - Bonus for having RJR carton contract, package fixture, savings contract and RJR private label/generic brands.
TCM	C NSS	1 1		$1 to $85	Total Category Management (convenience store only) - Bonus for having RJR Preferred presence Program, enhanced lighting and RJR private label/generic brands.
CMC	SS NSS	1 1		$75.00 $100.00	Category Management
SCPO (replaces SCDP1)	A B C	1 1 1	120-149 150-169 170+	$20.00 $30.00 $55.00	Savings Contract for Pack Outlets Supplemental fixture with a minimum of 18 rows dedicated to RJR Black & White/private label brands.

51846 6735

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

March 2, 1993

To: St. Paul, Minneapolis, Duluth and Madison Representatives

Subject: COUPONS/VPR'S

Ladies and Gentlemen:

All coupon and VPR ordering and tracking will be performed by Virjean Lindgren beginning March 1, 1993.

Attached is an initial supply of the new Coupon/VPR requisition form. Please discontinue using the Supply Requisition form for coupon requests only.Notice that the *front of the form is complete with item numbers and values of coupons/VPRs.* This side will be used for ordering coupons. The back of the form will be used for transferring coupons between Sales Reps and for returning coupons to Winston-Salem. When using the form for any reason, be sure to include your name, employee number, Division/District and assignment numbers.

The following outlines procedures for ordering, transferring and returning coupons to Winston-Salem.

Coupon/VPR Ordering

Complete the front part of the Coupon/VPR Requisition form and send to Virjean.

In extreme competitive situations where you require coupons that are not available, i.e., current $5.00 coupons(not currently on allocation), please make a note on the request form that these coupons should be produced at the office. These requests should be the exception.

Once your coupons have been received, return the shipping receipt, with any discrepancies noted, to the Promotion Coordinator **within 24 hours of receipt.** If the coupons were made in the office, a shipping receipt will **not** be mailed. In this case, call the Promotion Coordinator if you do not receive the coupons within three days or if you receive a quantity different from what you requested.

51846 6736

"We work for smokers"

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Returning Unused Obsolete (expired dates, etc.) Coupons

In this case, you may return partial rolls of coupons. Count the number of rolls/SKUs by item number and fill out the "Coupon Returns" portion of the Coupon/VPR Requisition form. You do not need a RA# for obsolete coupons. Include a copy of the form with the coupons and send a copy to the Promotion Coordinator so she can adjust your inventory in the system. Send the shipment "Freight Collect" to the following address

R.J. Reynolds Tobacco Company
GE72 Logistics, Inc.
5900 Grassy Creek Blvd
Winston-Salem, NC 27105
ATTN: Katie Young - for counting and disposal

Please follow the above guidelines for a smooth transition. Your help is appreciated.

Sincerely,

T.W. Goudreault
Region Operations Manager

51846 6737

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COUPON TRANSFERS/RETURNS FORM

COUPON TRANSFERS (FROM ONE PRESENTATIVE TO ANOTHER)

FROM	TO			
Name/Div/Dist #	Name/Div/Dist#	Quantity	Description/Item #	Value

COUPON RETURNS TO WINSTON-SALEM

Name/Div/Dist #	Quantity	Description/Item #/T-code	Value

RA#

51846 6738

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COUPON REQUISITION FORM

Name ______________________________
Employee No. ______________________________
Div/Dist & Assignment No.

SAVINGS MULTIBRAND COUPON REQUESTS

QUANTITY	ITEM NO	VALUE	QUANTITY	ITEM NO	VALUE
	PACK			CARTON	
	382483	$0.15		382362	$1.00
	382494	$0.20		382373	$1.50
	382505	$0.25		382384	$2.00
	382516	$0.30		382395	$2.50
	382527	$0.35		382417	$3.00
	382538	$0.40		382417	$3.50
				382428	$4.00

DORAL VPR REQUESTS

QUANTITY	ITEM NO	VALUE	QUANTITY	ITEM NO	VALUE
	PACK			CARTON	
	280579	$0.20		280568	$1.00
	151241	$0.20		280590	$1.50
	151186	$0.25		151131	$2.00
	151175	$0.30		151120	$2.50
	151164	$0.35		151109	$3.00
				151098	$3.50
				151087	$4.00

MAGNA/STERLING VPR REQUESTS

QUANTITY	ITEM NO	VALUE	QUANTITY	ITEM NO	VALUE
	PACK			CARTON	
	184626	$0.20		172636	$1.00
	172691	$0.20		172647	$1.50
	172702	$0.25		172658	$2.00
	187838	$0.30		187882	$2.50
	197144	$0.35		197166	$3.00
	248712	$0.40		197177	$3.50
				248701	$4.00

CONSUMER MISSION COUPON REQUESTS

QUANTITY	ITEM NO	DESCRIPTION
	401128	1 FREE PACK - DORAL/STERLING/MAGNA/CENTURY (25/SKU)
	390315	1 FREE PACK - RJR FULL PRICE (25 SKU)
	390326	$4 OFF CARTON - RJR FULL PRICE (25 SKU)

FOR OFFICE USE ONLY: ORDER NO:

51846 6739

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
T bacco Company

March 31, 1993

All Sales Representatives

SUBJECT: FIRST QUARTER PAY REGISTER

Dear Reps:

Attached please find your independent and (if applicable) any Chain Account Pay Registers for First Quarter 1993.

Due to the large volume of Independent Pay Registers which need to be approved, they should be returned back to this office no later than Tuesday, April 13th. Please send them in sooner if you are able to.

Please put a check mark by each store, to show that you have reviewed each account for accuracy, and make any appropriate changes needed. Also, attach any 7101's and contracts needed for changes. When finished, please sign the front page of your Pay Register and return to this office.

I appreciate your cooperation regarding these Pay Registers.

Sincerely,

T.W. Goudreault
Region Operations Manager

"We work for smokers"

51846 6740

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK II: PROMOTION COORDINATOR

51846 6741

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK II

Promotion Coordinator *Procedures*

© R.J. Reynolds Tobacco Company 1993

51846 6742

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK II:
PROMOTION COORDINATOR

The Promotion Coordinator (PRC) is charged with administering the Region's Workplan, which involves allocating and ordering promotions, coordinating Value-Added Programs, tracking certain Workplan programs, POS/PDI, and maintaining appropriate files. The PRC is also charged with performing the administrative functions associated with the Coupon Management System

As the Coupon Printer is introduced nationally, Chapters 6, 7, and 8 may be referred to less often. However, because only a limited number of printers will be available initially, these chapters remain important for situations when coupons are ordered via SMS.

CHAPTER 1: COORDINATING THE WORKPLAN 1-1

Workplan Flow 1-1

Terms and Definitions 1-1

Obtaining Initial Workplan Information 1-4

SMS Report 806 1-4

SMS Report 570 1-9

Developing the Workplan Book 1-11

Promotion Sheet 1-12

Allocating Promotions 1-14

Obtaining NMI Report 1-14

CHAPTER 2: COORDINATING VALUE-ADDED PROGRAMS 2-1

Preliminary Activities 2-1

Procedures 2-1

VAP Scroll List Details 2-2

Value-Added Transfer 2-6

CHAPTER 3: ORDERING BSGSFs 3-1

Preliminary Activities 3-1

Procedures 3-1

51846 6743

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

USING PROMOTIONAL PRODUCT ALLOCATION SCREENS......... 3-2
Allocation by Sales Level.................................... 3-5
Inquiry by Account Number.................................. 3-9
Transfer Allocations... 3-11
Direct Allocations Inquiry by Promotion...................... 3-14
Placing Orders.. 3-16
CHAPTER 4: ORDERING PREMIUMS................................ 4-1
Preliminary Activities.. 4-1
Task Overview... 4-1
Function 402... 4-1
Summary of Process.. 4-4
Category Order.. 4-6
Forms/Items Order... 4-15
Promotion Order.. 4-18
Copy Existing Order... 4-21
Bulk Ordering... 4-22
Function 422... 4-22
Procedure.. 4-22
Summary of Process.. 4-24
Forms/Items Order... 4-25
Function 425... 4-27
Procedure.. 4-27
Forms/Items Order... 4-31
Function 555... 4-35
Procedure.. 4-35
Add Locator... 4-37
Delete Locator... 4-40

51846 6744

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Change Locator 4-41
Delete Entries in Locator (Batch) 4-47
Display Locator 4-49
Display Invalid Entries in Locator 4-50
View Creation Criteria of Locator 4-51
Merge Locator Lists 4-52
Merge Locator Lists (Batch) 4-53
Print Locator Lists (Batch) 4-54
CHAPTER 5: OTHER PROCEDURES 5-1
Staging Orders 5-1
Troubleshooting Premiums 5-1
Handling Incremental Promotional Programs 5-1
Utilizing Leftover Premiums 5-2
Function 508 5-2
Function 524 5-3
Tracking/Monitoring Full-Price Promotions 5-5
Coordinating POS/PDI 5-5
Maintaining Goals 5-5
Troubleshooting Additional Problem Areas 5-5
CHAPTER 6: ORDERING COUPONS 6-1
Summary 6-1
Procedures 6-1
Function 524 6-2
Ordering Coupons Via SMS Function 402 6-5
Summary of Process 6-8
Category Order 6-10
Forms/Items Order 6-19

51846 6745

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Promotion Order 6-22
Copy Existing Order 6-26
Function 508 6-27
Printing Coupons 6-28
CHAPTER 7: MANAGING BACKROOM INVENTORIES 7-1
Summary 7-1
Function 125 7-1
Issuing Coupons and Updating Goals 7-3
Transferring Coupons to Another Employee 7-10
CHAPTER 8: OTHER CMS PROCEDURES 8-1
Reconciling Coupon Inventories 8-1
Returning Active Coupons to W-S 8-2
Returning Obsolete Coupons to W-S 8-2
Returning Active Coupons Via CMS 8-3
CMS Reports 8-6
Report Description and Request Parameters 8-6
Requesting Summary and Detail Reports 8-6
Requesting Reconciliation Reports 8-8
CHAPTER 9: UTILIZING THE COUPON PRINTER 9-1
Summary 9-1
Hardware Components 9-1
Operating Procedures 9-2
Phase 2 Software Overview 9-2
Account Selection 9-3
Print Coupons 9-4
Report Displays 9-5
Report Coupons/Premiums 9-5

51846 6746

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Report POS.. 9-6

Payment Verification/Draft Procedures.............................. 9-6

End Call.. 9-6

Communication.. 9-6

Modem Hookup... 9-6

Daily Communications... 9-7

Coupon Printer.. 9-8

Battery Maintenance... 9-9

Cleaning the Print Head... 9-10

Memory Card Trays.. 9-10

Troubleshooting... 9-10

Help Desk Support.. 9-10

51846 6747

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6748

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER I
Coordinating the Workplan

51846 6749

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COORDINATING THE WORKPLAN

Workplan Flow

Before the Promotion Coordinator can handle the administration of Workplan activities, they must understand the logic and flow behind the allocation process. In the allocation of virtually all promotional items, the following actions will occur.

Promotional allocations are received.

↓

Inter-Region transfers of allocated items occurs.

↓

Value-added and distributor assist commitments, if applicable, are satisfied first.

↓

After VAP and DAP has been satisfied, remaining items may be allocated to individual Sales reps and/or Direct Accounts. Promotions should be distributed to fully take advantage of opportunities within each Sales rep's assignment.

↓

Promotions are monitored/tracked for full utilization.

↓

Troubleshoot any discrepancies.

◆ **OBJECTIVE:** All allocated items will be distributed efficiently to satisfy individual account and territory needs.

Terms and Definitions

- **WORKPLAN** - All materials utilized to promote RJR products at retail. This includes promotions, coupons and advertising materials. The Workplan is an organized approach which communicates the what, where, when, why, and how of retail program implementation.

- **POS** - Point-of-Sale paper advertising materials used by the field to create impact and visibility for RJR brands at retail. Examples include posters, shelf strips, riser cards, canopy cards, and more.

51846 6750

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- PDI - Advertising materials designed to be Permanent, Dominant and Impactful. These advertising terms are designed for long-term placement. Examples include clocks, neon signs, ground mounts, grocery baskets and business hour signs.

- **NATIONAL MARKETING INDICATORS** - Numerical values input by sales reps which reflect, by individual retail account, the total number of units an account could sell of a given promotion type. Promotion types are:

  - BSGSF - Any Buy -Some-Get-Some-Free promotion. For example, Buy One Pack, Get Another Pack Free, or Buy Two Packs, Get One Free.

  - PACKAGE PREMIUM - Any promotion offering a premium with the purchase of individual packages of RJR product. Can come in 1, 2, 3, 4 and 5 pack offers.

  - PACKAGE COUPON - Any promotion offering a coupon discount with the purchase of individual packages of RJR product. Coupons redeemed at store level, with reimbursement to stores after submission to RJR.

  - PACKAGE VPR - Similar to coupons, these VPR's discount the price of packs; however, reimbursement for this discount is normally handled by sales reps at store level.

  - CARTON PREMIUM - Any promotion offering a premium with the purchase or one or more cartons of RJR product.

  - CARTON COUPON - Any promotion offering a coupon discount on one or more cartons of RJR product. Again, retailers receive reimbursements by submitting coupons to RJR.

  - CARTON VPR - A discount of the carton price of RJR product; Sales Reps reimburse the account directly.

51846 6751

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COORDINATING THE WORKPLAN

For each brand of Full Price cigarette RJR produces, Sales Reps enter the quantity of each of the above promotion types the account could sell in a given period. These quantities are National Marketing Indicators.

- **ASM** - Account Specific Marketing - A strategy utilized by sales reps and management which analyzes each account to determine the unique promotional opportunities present. ASM focuses not just on sales of RJR products, but also competitive products. This allows the Field to target certain promotion types where they can be most effective.
- **VALUE-ADDED PROGRAMS** - Programs designed to utilize Direct Accounts to pack and ship promotions sold by RJR personnel.
- **DISTRIBUTOR ASSIST PROGRAMS** - Programs designed to utilize Direct Accounts to sell, coordinate, and place promotions in low-volume calls not normally contacted by Field Sales. The difference between DAP and VAP programs is DAP requires the Direct Account to handle the entire process, from selling to placement. With VAP, RJR personnel sell the promotions - the Direct Account is required to simply ship it.
- **DRIVE PERIODS** - Time frame in which a given promotion will be worked. There are normally three drive periods per quarter — one a month.
- **ALLOCATION TRANSFERS** - Each Division is allotted promotions based on the needs of retail accounts within the Division. However, VAP/DAP programs often ship promotions into other Divisions/Regions. Because a Division is only given promotions for their retail accounts, it is necessary to request transfers of promotional items from other Divisions who will receive VAP/DAP shipments.

For example:

Division A has a VAP Direct Account which will be shipping a total of 50 Camel Lighter displays for its retail calls. Of those 50 accounts

51846 6752

© R.J. Reynolds Tobacco Company 1993

20 are in Division A

17 are in Division B

13 are in Division C

Division A will need to request 17 and 13 displays from B and C, respectively.

Obtaining Initial Workplan Information

I. The PRC obtains the Quarterly Workplan for all Divisions/districts in the Region. The Workplan information contains specifics regarding programs, timing and quantities.

Information is obtained via SIS Workplan Report 806 and SMS Workplan Communication Report 570.

SMS Report 806

1. With the SIS Main Menu displayed, place an "X" beside PRINT REPORT and press [ENTER].

2. The PRINT REPORT MENU will be displayed. Place an "X" beside HISTORICAL REPORT SELECTION MENU and press [ENTER].

```
GHCMGOMN                  PRINT REPORT MENU            05/13/93  15:19:31

_ DAILY SALES REP DETAIL CALL REPORT   _ MASTER ACCOUNT LIST
_ BRAND INVENTORY REPORT (*)           _ CHAIN MASTER ACCOUNT LIST
_ BRAND DISTRIBUTION REPORT (*)        _ WHOLESALE PRODUCT LINE LISTS
_ PROPOSED ALIGNMENT REPORT            _ BRAND DIST BY CALL CLASS (*)
_ ACCOUNT COVERAGE EXCEPTION REPORT    _ MONTHLY RETAIL COVERAGE REPORT
_ ACTIVITY SUMMARIES REPORT            _ CONTRACT SUMMARY REPORT
_ ACCOUNTS NOT CONTACTED REPORT        _ MERCH/ACCT MKT SUMMARY REPORT (*)
X HISTORICAL REPORT SELECTION MENU     _ CHAIN NON COMPLIANCE REPORT
_ REFERENCE SCREENS MANUAL             _ SALES ADDRESS LABELS
_ CONTRACT PAYMENT-INQUIRY RPT         _ CHAIN STANDARD INFORMATION
_ CONTRACT PAYMENT-BY ACCOUNT NO.      _ HH-BRAND TO BRAND NAME REPORT
_ CONTRACT PAYMENT-ALPHABETICAL NAME   _ COUPON MANAGEMENT ACTIVITY DETAILS
_ CONTRACT PAYMENT-CHAIN BY TERRITORY  _ COUPON MANAGEMENT INVENTORY REPORTS
_ SCANNING DISPLAY REPORT              _ CPN PLACEMENT/INVENTORY RECON RPT
_ CPN-MGT INTER-DIVISION TRANSFERS
        * THESE REPORTS WILL BE SCHEDULED FOR OVERNIGHT EXECUTION

_ CHECK THE STATUS OF A PREVIOUSLY SCHEDULED PRINT REPORT
_ CHECK THE STATUS OF A PREVIOUSLY SUBMITTED PRINT REPORT

PRESS PF1 TO RETURN TO THE SIS MAIN MENU
```

51846 6753

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The following screen will be displayed. Type "05" in the ENTER REPORT GROUP field and press [ENTER].

```
GHC517IN          HISTORICAL REPORTING SELECTION    05/13/93      15:20:42

                REPORT            REPORT GROUP
                GROUP             DESCRIPTION
                ------            ------------------------------
                  05              SIS HISTORICAL REPORTING
                  10              LRS HISTORICAL REPORTING
                  15              VOLUME HISTORICAL REPORTING
                  20              VENDING HISTORICAL REPORTING
                  25              SMS REPORTS
                  30              FIELD SALES OPERATING FUND RPT
                  35              COUPON TRACKING

            ENTER REPORT GROUP OR
            ENTER AN X FOR INDEX: 05

            PRESS PF1 TO RETURN TO PRINT REPORT MENU
```

51846 6754

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The following screen will be displayed. Type "806" in the ENTER REPORT NUMBER field and press [ENTER].

```
GHC526IN          SIS HISTORICAL REPORTING          05/13/93    15:21:29

              REPORT            REPORT
              NUMBER            DESCRIPTION
              ------            ----------------------------------
               120              TOP 25/BRAND OPPORTUNITY REPORT
               121              PRELIMINARY PAY REGISTER DETAIL
               122              PRELIMINARY PAY REGISTER TOTALS
               123              WEEKLY FINAL PAY REGISTER DETAIL
               125              QUARTERLY FINAL PAY REGISTER DETAIL
               126              QUARTERLY FINAL PAY REGISTER TOTALS
               127              SIS DIRECTORY OF CHAIN ACCOUNT
               130              ELECTRONIC SECURITY DEDUCTION REPT.
               132              ACCOUNTS PAID, NO CALL MADE REPORT
               134              CPR 'NO-PAY' ACCOUNT LIABILITY RPT
               135              DISTR. ASSIST PAYMENT SUMMARY RPT.
               137              LIST OF ACCOUNTS WITH MISSING TAXID
               141              MONTHLY RETAIL ACCOUNT COVERAGE RPT

          ENTER REPORT NUMBER: 806

          PRESS ENTER TO SCROLL
          PRESS PF1 TO RETURN TO HISTORICAL REPORTING SELECTION
```

51846 6755

© R.J. Reynolds Tobacco Company 1993

5. The following screen will be displayed.

- Select report pertinent to appropriate time period.
- Type your print destination.
- Type desired sales level (Region/Division).
- Press [ENTER] to request report.

```
                    HISTORICAL REPORT DETAIL MENU        05/13/93   15:22:19
                         REPORT: QUARTERLY WORKPLAN PROMOTIONS

NUMBER      DATE REPORT WAS PRODUCED     COMMENTS
------      ------------------------     ---------------------------------
 01.)          APRIL     27, 1993        3RD QUARTER 1993 REPORT
 02.)          MARCH     19, 1993        2ND QUARTER 1993 REPORT
 03.)          MARCH     17, 1993        1ST QUARTER 1993 REPORT




SELECTION NUMBER:       01               PRINT DESTINATION:     6326
SALES LEVEL:            6326XX

PRESS  PF1  TO RETURN TO HISTORICAL REPORT MENU
```

Following is an example of the Workplan Report 806.

51846 6756

© R.J. Reynolds Tobacco Company 1993

6326 MINNEAPOLIS DIVISION

TYPE	PROGRAM	PROGRAM DESCRIPTION	COMMODITY	SKU'S APR	SKU'S MAY	SKU'S JUN	SKU'S TOTAL	PACKING
BSGSF	300741	WINSTON Q2 BUY CARTON GET 5 FREE PACKS		70			70	60
BSGSF	300777	CAM CU BANDED B1G1F W/POS-CAT/INFO CD		2,140			2,140	40
BSGSF	300829	SALEM 2Q B2G1F (CORE FAMILY)				90	90	40
BSGSF	300996	WINSTON Q2 B1G1F SELECT OFFER		500			500	40
BSGSF	302524	CAMEL B1G1F (INCREMENTAL)		1,860			1,860	40
	300415	CAM $1.50/3 PKS CPN-30032 6/30/94 EXP.						
CPN		1.50/ CANCEL FEE	280975					100
POS		DUMP BIN R/C	280986					25
POS		PREM DISP R/C	280997					25
POS		24" PMC	281118					25
POS		CAM 24" PMC GENERIC	388247	12			12	25
	300750	WINSTON Q2 $1.00 OFF 2-PACKS CPN(M/B)						
CPN		1.00/2PK CPN PREP CH	381185					100
POS		PREMIUM RISER CD	381372		10		10	25
POS		DUMP BIN RISER CD	381383					25
POS		24" PKG MERCH CD	381394		12		12	25
	300753	WINSTON Q2/Q3 $ 3.00 OFF CARTON						
CPN		WIN 3.00/CTN CPN	381207	113			113	100
POS		WIN 2Q 3/CTN RISER	381306	12			12	25
POS		Q2 MILT SHELF STRP	381317	12			12	25
POS		WIN WIN Q3 3/CTN RIS	399181					25
POS		WIN Q3 MILT SHELF ST	399192					25
	300755	WIN Q2/Q3 $7.00 OFF 2 CARTONS CPN						
CPN		WIN 7.00/CTN CPN	381229	20			20	100
POS		Q2 FLR BASE RSR CD	381240	6			6	25
POS		Q3 FLR BASE RSR CD	399269					25
	300819	SALEM 2Q & 3Q $3 OFF CTN MULTI-BRAND CPN						
CPN		3/CTN	380184	86			86	100
POS		STATIC CLING	380173	4			4	50
POS		MILITARY SHELF STR	380162	4			4	100
POS		90 CTN FLOOR R/C	380151	4			4	25
	300825	SALEM 2Q $1/2 PKS CPNMULTIBRAND						
CPN		1/ 2 PKS	404582					100
POS		GM DUMP BIN R/C	379997					25
POS		GM PREM PROMO R/C	379986					25
POS		GM 24" PMC	379975	5			5	25
POS		MIP SECURITY R/C	379964					25
POS		MIP LARGE PASTER	379953					50
POS		MIP DISPLAY RISER CD	379942	5			5	25
	300827	SALEM 2Q $.50/ 1 PK CPN MULTIBRAND						
CPN		.50/ 1 PK C	404516					500
POS		GM DUMP BIN R/C	379920					25
POS		GM PREM PROMO R/C	379909					25
POS		GM 24" PMC	379898	8			8	25
POS		MIP SECURITY R/C	379887					25
POS		MIP LARGE PASTER	379876					50
POS		MIP DISPLAY RISER CD	379865	8			8	25
	300850	VANTAGE $1/2 PKS MULTIBRAND COUPON						
CPN		CPN PROD & SMS	404582					100
POS		24" MERCH CD & SMS	384749	18			18	25
POS		PREMIUM R/C & SMS	384760	6			6	25

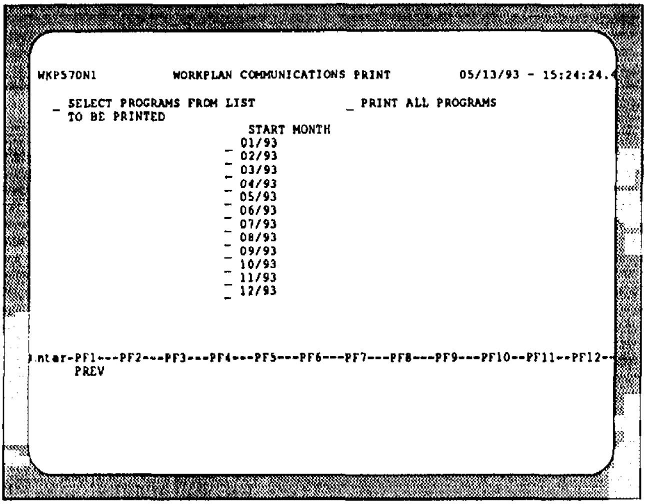
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COORDINATING THE WORKPLAN

SMS Report 570

1. With the SMS Main Menu displayed, type 570 in the FN field and press [ENTER].

2. The Workplan Communications Print screen will be displayed.



3. You have three options from this screen:

   - **PRINT SPECIFIC PROMOTIONS:** To select any combination of programs from the list to be printed, type an "X" in front of the SELECT PROGRAMS prompt and press [ENTER]. At the next screen, type "X" in front of the programs you wish to print, type your report destination, the number of copies and press [ENTER].

   - **PRINT ALL PROMOTIONS:** If you wish details for all programs, type an "X" in front of the PRINT ALL PROGRAMS option and press [ENTER].

   - **PRINT ALL PROMOTIONS FOR SPECIFIC TIME FRAME:** To print programs by start dates, type an "X" in front of the start dates you are interested in and press [ENTER]. At the next screen, type your printer destination, number of copies, and press [ENTER]. Reports should print at the specified destination only.

4. Following is an example of the SMS 570 report. This information is also sent from Winston-Salem once each quarter.

© R.J. Reynolds Tobacco Company 1993

51846 6758

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

R. J. REYNOLDS TOBACCO COMPANY

PROMOTIONAL PROGRAMS LISTING FOR SALES LEVEL 6326XX

PROMOTION #

302012 DESCRIPTION: CAM SPEC LTS $1.25/2 PK CPN W/5-SPOT CONTACT: JOHN ELLEGATE-5760 DTS: 07/05/93

DTOPS: VALUE ADDED SHIPPER: UPC CODE: 12300-70373

HH START: 07/05/93 HH END: 12/31/93 PC START: 07/05/93 PC END: 01/30/94

HH CODES DISPLAY PAYMENT RATE

COUPON: C SP.LTS $1.25/2

COMMENTS: CAMEL SPECIAL LIGHTS $1.25 OFF 2 PACKS COUPON-TO BE USED ONLY ON
SPECIAL LIGHTS PRODUCT!
PF3 FOR ITEM CODES-REMEMBER TO ORDER SUPPORTING POS!!!
PF6 FOR HH CODE-

ALLOC AVAIL: DTS MONTH	SMS	SIS
7		
8		
9		
10		
11		
12		

SMS ITEM	DESCRIPTION	PACKED/SKU
399874	CAM 1.25/2PK S. LT	100/SKU
399885	PREM. DISP R/C	25/SKU
399896	DUMP BIN R/C	25/SKU
399907	24" PMC-RU SPECIFI	25/SKU

DIVISIONS LINKED TO PROGRAM

JUL	1130	1134	1140	1222	1226	1228	1232	1524	1526	1528	1530	1632	2124	2126	2128
	2134	2135	2226	2332	2334	2428	2722	2723	2732	2734	2822	2824	2826	2828	2830
	2922	2928	2930	2942	4228	4229	4230	4232	4236	4324	4338	4425	4426	4427	4430
	4434	4436	4528	4530	4626	4628	4630	4632	4634	4722	4724	4726	4728	4734	5128
	5222	5226	5228	5230	5320	5328	5332	5334	5422	5426	5430	5432	5434	5534	5624
	5626	5628	5630	5638	6122	6124	6224	6228	6230	6234	6236	6322	6324	6326	6328
	6330	6332	6628	6632	6636	6722	6724	6726	6728	6828	1624	4226	4339	5322	
AUG	1140	2830	2930	2942	4230	4530	4726	5222	5432	5624	6230	6234	6636	6724	
SEP	2830	2930	4728	4734	5422										

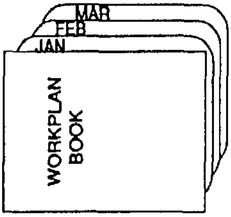
51846 6759

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Developing the Workplan Book

II. Develop initial format for Workplan Book. The Workplan Book is a tool utilized by sales reps and management which organizes and communicates promotional activities relating to the Workplan. One of the following formats should be utilized:

- Tab book by brand families
- Tab book by month/quarter program will be worked
- Combination of above



Once the "skeleton" of the Workplan Book has been set up, information regarding each promotion the Division will work should be placed behind the proper tab.

Data relative to each promotion should take up no more than the front and back of one piece of paper. By organizing this way, a sales representative will have a concise source of all information relating to promotions he/she will be working. The recommended format for each promotion page follows.

51846 6760

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Promotion Sheet

- FRONT
  - Picture of promotional item - obtain from the Region Operations Manager's National Workplan Book
  - Info detail from the 570 report

Winston

Promotion #: 301040

WKP10001 R.J. REYNOLDS TOBACCO CO. 11/11/92
PROMOTIONAL WORKPLAN BOOK FOR 2ND QTR 93

* PROGRAM: 301040 WW/C STURGIS T-SHIRT * BRAND: CAMEL FAMILY TYPE: OPPORTUNISTIC

ITEM DESCRIPTION: CAMEL STURGIS T-SHIRT PROGRAM. BUY 3 GET FREE STURGIS T-SHIRT POS PACKED W/PREMIUM SKU
DIVS: [illegible]

ITEM NO: [illegible] STURGIS T-SHIRT W/POS

PROMOTION DYNAMICS:
OBJECTIVE: TRIAL/CONVERSION

TARGET: MALE/FEMALE SMOKERS 21+

RECOMMENDED TIME TO WORK: JUNE

COSTS: SKUS 120.00 COST/PROMO.CTN $ 12.00
FY: SKU 2000

CONTINUITY INFORMATION:

PROGRAM CONTACT: [illegible]

SKU QUANTITY: 20/SKU

POS AVAILABLE: ITEM #:

All Winston-Salem information can be found on this page, as well as a picture of the promotional item, if available.

51846 6761

© R.J. Reynolds Tobacco Company 1993

- BACK
  - Allocation template noting rep allotments, ship to locations, etc.

Promotion: ______________

Division Utilization Period: ______________ DIVISION 6324

Terr #	Shipping Point								
1	Division Office J.P. Fritz								
2	Division Office Pioneer								
3	Division Office J.P. Fritz								
4	Division Office Segal's								
5	Storage Hermel								
6	Storage Hermel								
7	Storage Fox								
8	Storage Reynolds								
9	Storage J.P. Fritz								
10	Storage TriMart								
11	Storage Tony's								
12	Storage TriMart								
13	Storage Hub City								
14	Storage TriMart								
Regenscheid									
Schulte									
Wilson									
J.P. Fritz - VAP									
Gateway BP - VAP									
Hub City - VAP									
Office									
TOTAL									

NOTES: ______________

This template will be completed by inserting allocations, program title, dates and any pertinent notes later.

This information is driven by the local Operations Unit and informs Sales personnel of the quantities of each item they have for their use.

Prior to allocating promotions, the PRC should set up a master packet of these promotion sheets for all promotions being worked in the Region.

In many cases, since SMS allocations are available 1 - 2 months prior to a

51846 6762

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

given quarter, the sheets can be produced and the following steps taken well before the start of the Workplan period.

Allocating Promotions

III. After receiving the initial allocations from SMS the Region Operations Manager, with DM/RM assistance if needed, will determine the timing of each promotion. After this is done, the PRC must ensure any required transfers of materials takes place.

Transfers

1. If other Regions/Divisions have requested transfers, satisfy those requests.

   - If the Region has little or no allocation of the requested item, the PRC should communicate appropriately to the requesting Division and inform the Region Operations Manager.
   - To transfer premiums/coupons/VPRs to another Region/Division, see Materials Coordinator, Book III, Chapter 1.
   - To transfer product, see Promotion Coordinator, Chapter 3.

2. Communicate any transfer required from other operating units to those units. See Promotion Coordinator, Chapter 2.

   Once all transfers, both incoming and outgoing, are complete, the final allocation needs to be determined.

IV. After needed transfers have been made, the remaining product must first be allocated to appropriate VAP/DAP Direct Accounts. See Promotion Coordinator, Chapter 2.

V. Once VAP/DAP programs have been allotted, the remaining product is available for allocation and placement by Sales Reps. This reallocation should be based on factors relative to the opportunity in each territory for the given promotion. While Division management can provide a quick, general set of percentages to assist in breaking out allocations to reps, information is available in SIS which should allow the PRC to accurately allocate promotions.

- Utilize National Marketing Indicator report to determine promotional needs for each territory in each Division.

Obtaining NMI Report

Obtaining National Marketing Indicator Report (NMI)

1. With the SIS Main Menu displayed, type an "X" beside Master List and press [ENTER].
2. The SIS Master List Main Menu will be displayed. Enter "M01" in the FN field and press [ENTER].
3. The following screen will be displayed. Press [ENTER].

51846 6763

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COORDINATING THE WORKPLAN

```
SISM0151 - M01      MASTER LIST Account Selection Menu      05/13/93  15:26:07

ENTER a Value for each option you wish to select by.
  Account Number        ______                      Sales Level      (6326XX)
  Account Name          ____________________        Chain-ID         __ __ __
  Proposed Territory    ______                      Zip Code         ______
  Acct Type (R,D,I)     _ Segment<?> __ (XX=ALL)    Account Group    ____
  State                 _ County Code<?> ___        Tax Jurisdiction __ __
  Wholesaler Number     _____ Type _ (P=Primary S=Secondary V=VAP)
--------------------------------------------------------------------------------
|                              Function Menu                                  |
| _ M10 SELECT by Contract                  _ M80 SELECT by Local Ind/Acct Mkt |
| _ M11 SELECT by Accounts Contacted        _ M82 SELECT by Competitive Set    |
| _ M12 SELECT by Merchandiser                                                 |
| _ M13 SELECT by Brand Distribution                                           |
| _ M14 SELECT by Call Classification                                          |
| _ M16 SELECT by Account Marketing                                            |
| _ M17 SELECT by Volume                                                       |
--------------------------------------------------------------------------------

PF1 - SIS MAIN MENU
Current Selection Count: 0                            Next Function<?>: ___
```

From this screen, instruct the system to select appropriate Divisions:

- Type sales level desired at SALES LEVEL prompt
- Press [ENTER].

51846 6764

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The Account Scroll List will be displayed. Enter "M70" in the NEXT FUNCTION field and press [ENTER].

Displayed: 15 of 2017   Account Scroll - M03   05/13/93 15:27:17

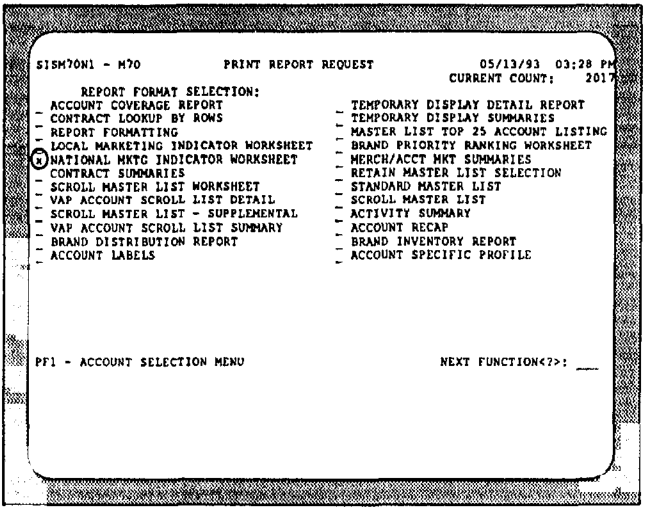
Terr	Rte	Acct	CC	Name	Address	City
632605	000	581454	C13	VALLEY LIQUOR	1102 SHAKOPEE TOWN	SHAKOPEE
632605	359	568829	D52	CHANHASSEN VIDEO	530 W 79TH STREET	CHANHASSEN
632601	000	023539	C06	COLONY LIQUOR STORE	15705 35TH AVENUE N	PLYMOUTH
632601	000	236187	C13	CLARK OIL #1132	7300 BROOKLYN BLVD	BROOKLYN PARK
632601	000	455454	E06	DRUG EMPORIUM #905	4190 VINEWOOD LN. N	PLYMOUTH
632601	000	460032	A04	O RYAN'S CONOCO	11201 93RD AVE. N.	MAPLE GROVE
632601	000	468298	C06	MGM LIQUOR #035	3900 VINEWOOD LANE	PLYMOUTH
632601	000	475956	A04	BILL'S SUPERETTE HDQ	6272 BOONE AVE. NO.	BROOKLYN PARK
632601	000	497220	K04	SUPERAMERICA #4461	9300 ZANE AVE. N.	BROOKLYN PARK
632601	000	548480	E06	KELLY'S LIQUOR	3210 BROOKDALE DR.	BROOKLYN PARK
632601	000	565211	B04	CONOCO #23045	12650 COUNTY RD 10	PLYMOUTH
632601	000	574533	C13	VILLAGE STORE	239 MEDINA ST. N.	LORETTO
632601	000	868022	A04	Q SUPERETTES MIDWEST	2365 COMMERCE BLVD.	MOUND
632601	005	236939	K04	CHAMPLIN FOODS	10 CURTIS ROAD	CHAMPLIN
632601	010	872461	B04	EXPRESS LANE GROCERY	508 HIGHWAY 52	CHAMPLIN

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts
PF1 - Account Selection Menu PF2 - Begin of Acct Group
Next Function<?>: M70

51846 6765

© R.J. Reynolds Tobacco Company 1993

5. The PRINT REPORT REQUEST screen will be displayed. Enter an "X" beside NATIONAL MKTG INDICATOR WORKSHEET and press [ENTER].



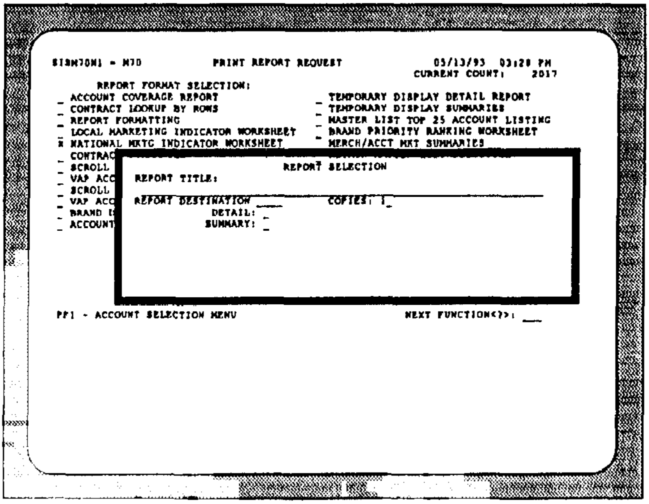
```
SISM70N1 - M70          PRINT REPORT REQUEST            05/13/93  03:28 PM
                                                        CURRENT COUNT:   2017
      REPORT FORMAT SELECTION:
_ ACCOUNT COVERAGE REPORT                   _ TEMPORARY DISPLAY DETAIL REPORT
_ CONTRACT LOOKUP BY ROWS                   _ TEMPORARY DISPLAY SUMMARIES
_ REPORT FORMATTING                         _ MASTER LIST TOP 25 ACCOUNT LISTING
_ LOCAL MARKETING INDICATOR WORKSHEET       _ BRAND PRIORITY RANKING WORKSHEET
x NATIONAL MKTG INDICATOR WORKSHEET         _ MERCH/ACCT MKT SUMMARIES
_ CONTRACT SUMMARIES                        _ RETAIN MASTER LIST SELECTION
_ SCROLL MASTER LIST WORKSHEET              _ STANDARD MASTER LIST
_ VAP ACCOUNT SCROLL LIST DETAIL            _ SCROLL MASTER LIST
_ SCROLL MASTER LIST - SUPPLEMENTAL         _ ACTIVITY SUMMARY
_ VAP ACCOUNT SCROLL LIST SUMMARY           _ ACCOUNT RECAP
_ BRAND DISTRIBUTION REPORT                 _ BRAND INVENTORY REPORT
_ ACCOUNT LABELS                            _ ACCOUNT SPECIFIC PROFILE

PF1 - ACCOUNT SELECTION MENU                        NEXT FUNCTION<?>: __
```

51846 6766

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. The following window will be displayed. Enter the report destination and select whether you wish to view summary or detail information. Press [ENTER].



Selecting "Summary"

- If at Division level, will total NMI data by territory for each promotional type
- If at the Region level, will total indicators for each promotion type, by Division. These summary reports provide the data needed.

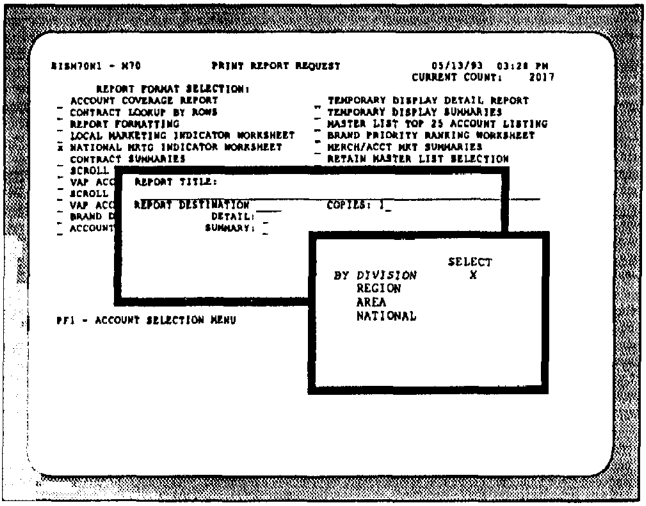
Selecting "Detail":

- If at Division level, will generate a list of each account and the indicators for each promotion type.
- If at Region level, will generate a list of each account in the Region and the indicators for each promo type.

51846 6767

© R.J. Reynolds Tobacco Company 1993

7. Another window will be displayed where selections are made by Division, Region, Area, or national. Note instructions on previous page.



Following is an example of the National Marketing Indicator Report. The example shown does not represent the entire report. Several additional pages will print indicating NMI data for other full-price brands and promotion types.

51846 6768

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

SI8649B5 NATIONAL MARKETING INDICATORS IN MASTER LIST 07/06/93

Sales level: 6326XX BY TERRITORY

Report title:

Territory	OVERDEV SAVINGS	WIN BXGXF	WIN PKG PREMIUM	WIN PKG COUPON	WIN PKG VPR	WIN CTN PREMIUM	WIN CTN COUPON	WIN CTN VPR
632601 632601 TERRITORY	37	2460	3060	4460	260	500	1420	
632602 632602 TERRITORY	29	1620	2600	2440	100	680	840	
632603 632603 TERRITORY	8	1900	1520	1140	660	140	480	
632604 632604 TERRITORY	15	1680	1780	1840	520	480	540	80
632605 632605 TERRITORY		2780	2300	2180		300	1210	
632606 632606 TERRITORY	16	2060	2300	1960	390	820	1570	
632607 632607 TERRITORY	44	1340	1120	1560	300	540	880	
632608 632608 TERRITORY	40	2420	600	2020	120	560	1100	
632609 632609 TERRITORY	7	1460	1380	1400	300	60	380	
632610 632610 TERRITORY	2	2442	2300	1440	1000	220	440	60
632611 632611 TERRITORY	1	220	160	20	140			
*** TOTALS ***	199	20382	19120	20460	3790	4300	8860	140
** STORES WITH **	199	700	668	643	148	98	213	5
STORES IN SELECTION	1980							

51846 6769

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COORDINATING THE WORKPLAN

Using information taken directly from the NMI Report, the PRC can establish "weights" for each rep and promotion type. For example:

	NMI TOTAL Win pkg Coup	WEIGHTING %
REP 1	1000	25%
REP 2	1000	25%
REP 3	2000	50%
	4000	100%

In this example, Rep 1 should receive 25% of any allocation for this promotional type. While this information can be derived manually, this logic can be formatted into an Excel spreadsheet similar to the one below. This spreadsheet will determine weighting percentages (based on raw data formed on NMI Report) and apply them to available allocations.

PROMOTIONAL ALLOCATION WORKSHEET

WINSTON

Enter Item:	❶ 87		❶ 150		❶ 350		17		60		267
Territory	BxGxF	Allocated	Pkg Prem	Allocated	Pkg Coup	Allocated	Pkg VPR	Allocated	Ctn Prem	Allocated	Ctn Coup
	❷	❸	❷	❸	❷	❸					
1	2360	6	1000	7	925	18	400	3	1300	13	3130
2	2700	7	1260	9	600	12	420	3	280	3	1160
3	1560	4	1070	8	470	9	80	1	100	1	720
4	2880	7	1840	13	1140	23	140	1	240	2	660
5	2600	6	1420	10	2160	43	0	0	520	6	1120
6	3160	8	1620	12	1560	31	0	0	800	8	920
7	3840	9	2200	16	1960	39	200	1	600	6	900
8	1580	4	1780	13	1740	35	0	0	240	2	580
9	0	0	960	7	0	0	0	0	0	0	20
10	940	2	1700	12	1960	39	0	0	420	4	1060
11	3660	9	2200	16	1960	39	1040	8	800	8	2470
12	1360	3	780	6	780	15	0	0	140	1	700
13	640	2	1140	8	840	17	40	0	540	5	1300
14				0		0		0		0	
15	0	0		0		0		0		0	
RSO#1			660	5	510	10		0		0	
RSO#2			660	5	510	10		0		0	
RSO #3			660	5	510	10		0		0	
TOTAL	27300	87	20950	150	17645	350	2320	17	5980	60	14740

❶ These cells represent division allocations, after VAP, for a given item. To determine an item's rep breakout, simply input amount needing to be allocated above the appropriate promotion type (i.e., Winston BXGXF, Winston Pkg Prem, etc.)

❷ These are total quantities, by promotion type and sales rep, requested based on NMI data. These quantities are taken directly from the National Marketing Indicator report and are used to derive weighting percentages for each promo type and sales rep.

❸ The percentages derived above are applied against the allocations available (1) and an allocated quantity unique and weighted to that rep and promo type is generated.

- After inputting allocation data to spreadsheet, doublecheck breakouts and adjust where necessary. The accuracy of sales rep indicator data will drive the need to adjust. NMI data must be consistently entered.

- Fill in each promotion sheet previously developed by writing allocations into appropriate columns. Add comments as necessary.

51846 6770

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Promotion: CAMEL BRASS LIGHTER

Division Utilization Period: JUNE 28 - JULY 30 DIVISION 6324

Terr #	Shipping Point	LIGHTER # 381386							
1	Division Office								
	J.P. Ritz								
2	Division Office								
	Pioneer								
3	Division Office								
	J.P. Ritz								
4	Division Office								
	Segal's								
5	Storage								
	Hemmel								
6	Storage								
	Hemmel								
7	Storage								
	Fox								
8	Storage								
	Reynolds								
9	Storage								
	J.P. Ritz								
10	Storage								
	TriMart								
11	Storage								
	Tory's								
12	Storage								
	TriMart								
13	Storage								
	Hub City								
14	Storage								
	TriMart								
Regenscheid									
Schulte									
Wilson									
J.P. Ritz - YAP									
Gateway BP - YAP									
Hub City - YAP									
Other									
TOTAL									

NOTES: ____

VI. Place completed program forms into Workplan book. Three other sections should be included in each book:

- Full Price Workplan Guidelines
- Region Savings Brand Guidelines
- Quarterly calendar, if needed
- Miscellaneous Correspondence

Once all quarterly information for each Division has been placed in each Division's master book, copies should be made for sales reps. After initial setup, contents will be updated quarterly and sent to reps for placement in their Workplan Book.

51846 6771

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 2
Coordinating Value-Added Programs

51846 6772

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

COORDINATING VALUE-ADDED PROGRAMS

Preliminary Activities

- Ensure SIS information is as accurate as possible (i.e., primary/VAP wholesaler account number, VAP supplier number, PP indicators, etc.)
- Develop and maintain direct account "contact sheet." This document should contain information such as SIS numbers, addresses, names of key contacts, special instructions, phone numbers, EFT numbers etc., for all VAP directs in Region.
- Develop Region guidelines for timing of VAP shipments, transfer completion dates, etc.
- Allocation for value-added promotions must occur before breaking out promotion to sales reps.

Remember the Workplan Flow Formula:

ORIGINAL ALLOCATIONS
- TRANSFERS TO
+ TRANSFERS FROM

NET ALLOCATION FOR REGION
- VAP NEEDS
- DAP NEEDS

SALES REP ALLOCATION

The following procedures indicate how to ensure this formula is followed accurately and completely.

Procedures

I. Management will select promotion and display loads for VAP. Direct chain VAP promotions are selected by CAM responsible for chain. Region Operations Manager selects promotions and displays loads for all other VAP accounts.

II. Review Division workplan information relative to the promotion chosen for VAP. Refer to reports 806 and 570. Information includes timetables, commodity #s, Handheld reporting and quantities.

III. Extract VAP scroll detail. This report needs to be pulled for every promotion being shipped via VAP because of ongoing changes. Two versions of this report are needed:

- A VAP scroll list for all VAP direct accounts which lists all retail accounts serviced by the direct account and
- A VAP scroll list for each VAP account by state. These lists are needed to communicate tax-stamping requirements to applicable wholesalers.

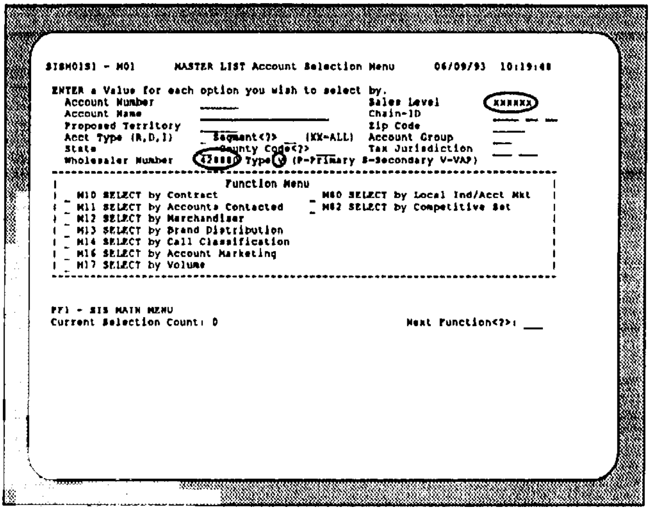
51846 6773

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VAP Scroll List Details

1. With the SIS Main Menu displayed, place an "X" beside Master List and press [ENTER]. Enter M01 in the FN field and press [ENTER]. The following screen will be displayed.



```
SISM01S1 - M01     MASTER LIST Account Selection Menu     06/09/93  10:19:48

ENTER a Value for each option you wish to select by.
  Account Number        ______                          Sales Level      XXXXXX
  Account Name          ____________________            Chain-ID         ____ __ __
  Proposed Territory    _____                           Zip Code         _____
  Acct Type (R,D,I)     _ Segment<?> __ (XX-ALL)        Account Group    ___
  State                 __ County Code<?> ___           Tax Jurisdiction ___ ___
  Wholesaler Number     [illegible] Type V (P-Primary S-Secondary V-VAP)
----------------------------------------------------------------------------
|                            Function Menu                                 |
| _ M10 SELECT by Contract                 _ M80 SELECT by Local Ind/Acct Mkt |
| _ M11 SELECT by Accounts Contacted       _ M82 SELECT by Competitive Set    |
| _ M12 SELECT by Merchandiser                                             |
| _ M13 SELECT by Brand Distribution                                       |
| _ M14 SELECT by Call Classification                                      |
| _ M16 SELECT by Account Marketing                                        |
| _ M17 SELECT by Volume                                                   |
----------------------------------------------------------------------------

PF1 - SIS MAIN MENU
Current Selection Count: 0                              Next Function<?>: ___
```

2. Enter the WHOLESALER NUMBER, the TYPE, the SALES LEVEL (this must be all x's) and press [ENTER]. The following screen will be displayed.

51846 6774

© R.J. Reynolds Tobacco Company 1993

```
Displayed: 15      of 2017       Account Scroll - M03        05/13/93  15:32:47

   Terr   Rte  Acct   CC  Name                     Address             City
(A)632605 000 581454 C13 VALLEY LIQUOR            1102 SHAKOPEE TOWN  SHAKOPEE
   632605 359 568829 D52 CHANHASSEN VIDEO         530 W 79TH STREET   CHANHASSEN
 _ 632601 000 023539 C06 COLONY LIQUOR STORE      15705 35TH AVENUE N PLYMOUTH
 _ 632601 000 236187 C13 CLARK OIL #1132          7300 BROOKLYN BLVD  BROOKLYN PARK
 _ 632601 000 455454 E06 DRUG EMPORIUM #905       4190 VINEWOOD LN. N PLYMOUTH
 _ 632601 000 460032 A04 O RYAN'S CONOCO          11201 93RD AVE. N.  MAPLE GROVE
 _ 632601 000 468298 C06 MGM LIQUOR #035          3900 VINEWOOD LANE  PLYMOUTH
 _ 632601 000 475956 A04 BILL'S SUPERETTE HDQ     6272 BOONE AVE. NO. BROOKLYN PARK
 _ 632601 000 497220 K04 SUPERAMERICA #4461       9300 ZANE AVE. N.   BROOKLYN PARK
 _ 632601 000 548460 E06 KELLY'S LIQUOR           3210 BROOKDALE DR.  BROOKLYN PARK
 _ 632601 000 565211 B04 CONOCO #23045            12650 COUNTY RD 10  PLYMOUTH
 _ 632601 000 574533 C13 VILLAGE STORE            239 MEDINA ST. N.   LORETTO
 _ 632601 000 868022 A04 Q SUPERETTES MIDWEST     2365 COMMERCE BLVD. MOUND
 _ 632601 005 236939 K04 CHAMPLIN FOODS           10  CURTIS ROAD     CHAMPLIN
 _ 632601 010 872461 B04 EXPRESS LANE GROCERY     508 HIGHWAY 52      CHAMPLIN
 _
NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts
PF1 - Account Selection Menu  PF2 - Begin of Acct Group
                                                     Next Function<?>:(M70)
```

3. Enter an "A" to view all selected accounts and enter M70 in the NEXT FUNCTION field. Press [ENTER]. The following screen will be displayed.

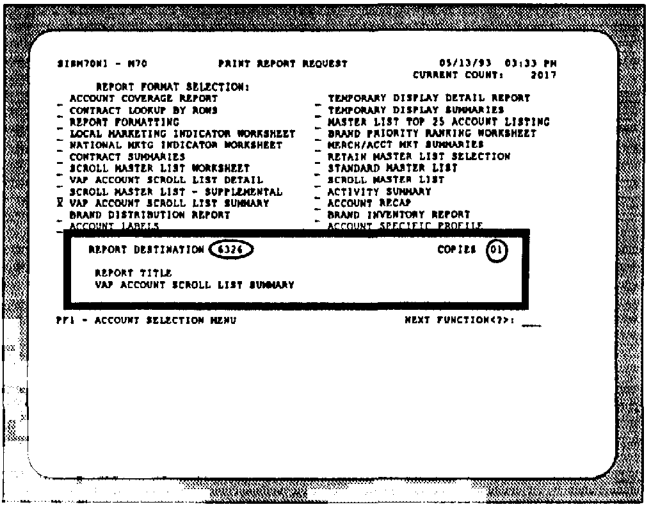
```
SISN70N1 - M70          PRINT REPORT REQUEST               05/13/93  03:33 PM
                                                       CURRENT COUNT:     2017
      REPORT FORMAT SELECTION:
 _ ACCOUNT COVERAGE REPORT                _ TEMPORARY DISPLAY DETAIL REPORT
 _ CONTRACT LOOKUP BY ROWS                _ TEMPORARY DISPLAY SUMMARIES
 _ REPORT FORMATTING                      _ MASTER LIST TOP 25 ACCOUNT LISTING
 _ LOCAL MARKETING INDICATOR WORKSHEET    _ BRAND PRIORITY RANKING WORKSHEET
 _ NATIONAL MKTG INDICATOR WORKSHEET      _ MERCH/ACCT MKT SUMMARIES
 _ CONTRACT SUMMARIES                     _ RETAIN MASTER LIST SELECTION
 _ SCROLL MASTER LIST WORKSHEET           _ STANDARD MASTER LIST
(X)VAP ACCOUNT SCROLL LIST DETAIL         _ SCROLL MASTER LIST
 _ SCROLL MASTER LIST - SUPPLEMENTAL      _ ACTIVITY SUMMARY
 _ VAP ACCOUNT SCROLL LIST SUMMARY        _ ACCOUNT RECAP
 _ BRAND DISTRIBUTION REPORT              _ BRAND INVENTORY REPORT
 _ ACCOUNT LABELS                         _ ACCOUNT SPECIFIC PROFILE


PF1 - ACCOUNT SELECTION MENU                          NEXT FUNCTION<?>: __
```

51846 6775

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Enter an "X" beside VAP ACCOUNT SCROLL LIST DETAIL and press [ENTER]. The following window will be displayed, where you may enter the report name, your destination and copies required.



Following is an example of a Value-Added Scroll List Detail report.

51846 6776

© R.J. Reynolds Tobacco Company 1993

COORDINATING VALUE-ADDED PROGRAMS

GHC726BN

VAP ACCOUNT SCROLL LIST DETAIL REPORT
WATSON 6328
WATSON COMPANY, INC 325249

SUPPLIER	ACCOUNT	TERR	NAME	ADDRESS	CITY	ST	PP#1	PP#2	PP#3	EXTRA SKUS	PP TOTAL	VAP OVR	VAP ALLOC	DIV ALLOC
337320	451739	632607	COUNTRY LINE LIQUOR	6623 N LAKE BLVD	FOREST LAKE	MN	0	0	0	0	0	0	0	0
416550	542306	632607	NORTHBOUND LIQUOR	56 MAIN STREET	ELK RIVER	MN	1	0	0	0	1	0	1	0
	966161	632607	CENEX CONVENIENCE	13374 WEST HWY 10	ELK RIVER	MN	1	0	0	0	1	0	1	0
	950325	632607	PRINCETON TOWN MKT	211 N LA GRANDE	PRINCETON	MN	0	1	0	0	2	0	2	0
	408337	632607	ACME COUNTRY EXPRESS	JCT 169 & 95 BOX 214	PRINCETON	MN	1	0	0	0	1	0	1	0
	074156	632607	MURRAYS CORNER STORE	34070 HELIUM ST NW	PRINCETON	MN	0	1	0	0	2	0	2	0
577570	331473	632607	SHORT STOP SUPERETTE	7772	GRAND RAPIDS	MN	1	0	0	0	1	0	1	0
362231	437285	632607	COLONIAL LIQUOR	25 N LAKE ST	FOREST LAKE	MN	1	0	0	0	1	0	1	0
72600	560149	632607	WARREN'S PLACE	155 1ST STREET SW	HILLHAVEN	MN	1	0	0	0	1	0	1	0
					TOTAL ACCOUNTS -	9	6	2	0	0	10		10	0
					TOTAL ACCOUNTS -	9	6	2	0	0	10		10	0

To access the VAP Detail per state, follow previous instructions and indicate state desired when at the Main Master List screen.

Description of VAP Scroll List Detail Report data:

Supplier - Account number assigned to the retailer by the Direct Account, not by RJR

Account - RJR account number

Terr - Division and territory number in which the account resides

Name, Address, City, State - Information specific to the account

PP indicators - 1 or 0 will appear in one of these options
- PP#1 - Indicates the accounts should receive one display of a given promotion - can be input by reps via handheld or on an office PC
- PP#2 - Indicates the accounts should receive two displays
- PP#3 - Indicates the accounts should receive three displays

Extra SKUs - If extra SKUs (in addition to PP# total) are needed, they appear here

PP Total - Total number of displays to be shipped to an account

The Total Accounts line indicates the sum of all retail accounts in the report in each column.

51846 6777

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

IV. Utilize these reports to determine the quantity of promotional SKUs needed to satisfy VAP requirements for each VAP direct account. These totals are required:

- To determine Direct Account needs. Utilize VAP scroll detail and check VAP total column on final page of report. This will indicate the number of displays needed for the program.
- To determine tax stamping requirements for each state, P.P. indicators need to be totaled by state for each VAP Direct Account. This information should be utilized when ordering product for tax stamping purposes at the direct account, etc. See *Ordering BSGSF* for information on utilizing this report.
- To determine transfer needs, use the following instructions.

Value-Added Transfer

See the following pages for Value-Added Transfer procedures.

51846 6778

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Please review the following set of procedures before using the Premiums, Coupons, VPRs transfer function.

I. VAP TRANSFER - PREMIUMS, COUPONS, VPRs,

Step 1: Select "**Master List**" from SIS menu.
Step 2: Enter function "M40" - VAP function.
Step 3: Enter "M42" - VAP Transfer (Premium, VPR, CPN).
Step 4: Enter "**VAP Wholesaler Number**" for the direct account assembling/delivering the promotion. (The VAP Wholesaler Number entered must be a valid direct account in your geographic location.)
Step 5: Enter "**Promotion Year**" of allocations you are transferring.

```
WKPM42N1    17 OF   517    WORKPLAN MATERIALS ORDERING

                                           NEXT PROGRAM 300286
  PROGRAM    TYPE   START DATE   PROGRAM TITLE
_ 303481    PREMIUM 07/05/93    CAM. B2GF 14-OZ. TUMBLER HLDVR(AGED)
_ 303443    PREMIUM 07/05/93    MWSA M/B-B2G $1/GAS(MICHIGAN SHELL)
_ 303253    PREMIUM  07/05/93   SALEM B2GF POOLBALL BOTTLE OPENER
_ 303253    PREMIUM  07/05/93   SALEM B2GF POOLBALL BOTTLE OPENER
_ 303253    PREMIUM  07/05/93   SALEM B2GF POOLBALL BOTTLE OPENER
_ 303203    PREMIUM  07/05/93   CAMEL PM B3GF TKT.TO GT RACE/PORT.
```

Step 6:
Enter "**Program Number**" in the "**Next Program**" in upper right of the screen to jump directly to that program or scroll to the selected program by pressing enter. When the program number appears select with an "X" and **press enter.**

```
WKPM42N1  517 OF  517    WORKPLAN MATERIALS ORDERING

                        ITEM SELECTION
                         MARK YOUR SELECTION(S) WITH X
 x  282702   SALEM CORD CAP W/POS            __ 409235  HAT 1.65
 __ 409246   PKG .321
                        PRESS  ENTER TO CONTINUE
```

Step 7:
Select the item you are transferring SKUs for with an "X" and **press enter.**

```
WKPM42N2 - M42      VALUE ADDED QUANTITY TRANSFER


      PROGRAM: 300286 SALEM 1QTR B2GF CORDUROY HAT

         ITEM: 282702 SALEM CORD CAP W/ POS      PACKING: 20/SKU

                              DRIVE PERIOD
                           x  JAN 93        _  FEB 93
                           _  MAR 93        _
```

Step 8:
Select the drive period you are transferring allocations for with an "X" and **press enter.**
<u>NOTE</u>: You may only transfer once per drive period/per item/ per account.

```
WKPM42N2 - M42      VALUE ADDED QUANTITY TRANSFER


      PROGRAM: 300286 SALEM 1QTR B2GF CORDUROY HAT

      ITEM: 282702 SALEM CORD CAP W/ POS         PACKING: 20/SKU


                              IND. TYPE SELECTION
                                PROMOTIONAL: x
                                        VAP: _
```

Step 9:
- If a **premium program** has been selected, you may select "**National Promotional Indicators**" <u>or</u> "**VAP Indicators**" to determine quantities.
- If a **coupon or VPR program** has been selected you may only select "**National Promotional Indicators.**"

<u>Note</u>: **Indicator quantities must be used in order to utilize this function.**

<u>**Definitions**</u>: **National Promotional Indicators**: Indicators by brand and vehicle in salable units for a two-week time period entered by Sales Reps.
VAP Indicators: Indicators in SKUs which can be used for premium and BSGSF programs only (PP Pack #1, PP Pack #2, PP Pack #3, PP Ctn, PP Extra SKU, VAP Over-ride Qty.). On October 4, the VAP Indicators will no longer be available.

sGR3:k 7/19/93

51846 6779

I. VAP TRANSFER - PREMIUMS, COUPONS, VPRs, (CONTINUED)

WKPM42N5 - M42 VALUE ADDED QUANTITY TRANSFER

CAMEL:

_ CAM BXGXF	_ CAM PKG PREMIUM	_ CAM PKG COUPON	_ CAM PKG VPR
	_ CAM CTN PREMIUM	_ CAM CTN COUPON	_ CAM CTN VPR

SALEM:

_ SAL BXGXF	x SAL PKG PREMIUM	_ SAL PKG COUPON	_ SAL PKG VPR
	_ SAL CTN PREMIUM	_ SAL CTN COUPON	_ SAL CTN VPR

Step 10:
Select the indicator with an "X" for the type promotion you are transferring allocations.

WKPM42N3 18 OF 28 VALUE ADDED TRANSFERS

TERR	ACCT	NAME	CITY	VAP WHOLESALER	UNIT	SKU
212402	300779	ZEBULON DRUG CO	ZEBULON	510056	30	2
212402	491115	ROSES #378	ZEBULON	510056	20	1
212402	046632	FOOD LION #341	ZEBULON	510056	40	2
212402	301770	PIGGLY WIGGLY 44	CREEDMOOR	510056	30	2

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
PF11--PF12---
PREV BEGIN QTY SUMM UPD ACCT MENU

Step 11:
A scroll list of accounts assigned to the VAP wholesaler you entered will be displayed.

- If you selected "National Promotional Indicators" for a premium program, the salable units and SKU units for each account will be displayed. If you selected coupon or VPR program, salable units only will be displayed.
- If you selected VAP Indicators, the SKUs will be displayed for each account.

WKPM42N3 18 OF 28 VALUE ADDED TRANSFERS

TERR	ACCT	NAME	CITY	VAP WHOLES.	UNIT	SKU
212402	300779	ZEBULON DRUG CO	ZEBULON	510056	_30	2
212402	491115	ROSES #378	ZEBULON	510056	_20	1
212402	046632	FOOD LION #341	ZEBULON	510056	_40	2
121402	301770	PIGGLY WIGGLY 44	CREEDMOOR	510056	_30	2
212402	099238	FOOD LION #223	BUTNER	510056	_60	3
212402	193768	PIGGLY WIGGLY #23	FRANKLINTON	510056	_10	1

INPUT OPTIONS
_ USE DEFAULT QUANTITIES: ___
_ USE PERCENT DECREASE: ___
X TIME PERIOD IN WEEKS: 4
PF5 = ESCAPE

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---
PF11-PF12---
PREV BEGIN QTY SUMM UPD ACCT MENU

Step 12: (Optional)
If you need to make mass adjustments to the indicator quantities for Valued-Added Transfer, select the "PF3" key. The options are:

USE DEFAULT QUANTITIES: Enter default quantity to be given to each account. The quantity entered cannot exceed the salable units currently displayed.

USE PERCENT DECREASE: Enter the percent to decrease each quantity. No account can be reduced to "0".

TIME PERIOD IN WEEKS: The salable units displayed are a two-week time period. Enter the number of weeks the promotion will be worked (max. no. is 6 wks.). PF6 allows you to jump to specific account.

51846 6780

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

I. VAP TRANSFER - PREMIUMS, COUPONS, VPRs, (CONTINUED)

```
WKPM42N9 - M42              VALUE ADDED TRANSFER

PROGRAM: 300286  SALEM 1QTR B2GF CORDUROY HAT
DRIVE PERIOD: JANUARY, 1993                  PACKING: 20 /SKU
                                                SMS ALLOCATION
DIVISION   TOTAL SALABLE UNITS   TOTAL SKU'S    BALANCE   LEVEL
--------   -------------------   -----------    -------   -----
 2124XX                  570             29        10       D
 2126XX                1,575             79        25       D

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
      PREV
End of Data...
```

Step 13: (Optional)
Select PF4 Key for summary screen of total SKUs to be transferred by division. For premium program selected, the salable units are converted to SKUs at the account level and totaled by division.
If coupon or VPR program was selected, the salable units are converted to SKUs at the division level and totaled by division.
This screen also displays the current SMS allocations for the item and the level at which the allocation currently resides.
"D"-Division, "R"-Region
"A"-Area, "N"-National
Enter PF1 to previous screen.

```
WKPM42NB - M42              VALUE ADDED TRANSFER
PROGRAM: 300286  SALEM 1QTR B2GF CORDUROY HAT
DRIVE PERIOD: JANUARY, 1993                  PACKING: 20 /SKU
DIVISION  TOTAL SALABLE UNITS  TOTAL SKU'S  SMS ALLOC BAL.& LEVEL
--------  -------------------  -----------  ---------------------
 2124XX                 570          86          10        D
 2126XX               1,575         237          25        D
                  -----------   ----------   ----------
 TOTAL                2,145         323          35

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
      PREV  BEGIN             UPD
```

Step 14:
Select PF5 Key for "Transfer Worksheet" of total SKUs to be transferred by division. This screen in the final review screen for allocation adjustments by sales level. Total SKUs for transfer are displayed in the "Total" line
You may adjust SKU quantities by sales level. By typing over the quantities, you may make changes. However, the sum of the adjusted SKUs must equal the total SKUs displayed at the bottom. The SKU totals cannot exceed the SMS allocations at any level of the allocation.
Press "PF5" when you are ready to submit the transfer or "PF1" to abort the transfer.
The list of accounts you have transferred allocations for will be saved for viewing or printing.
- You have completed the transfer process. The "Transfer Allocation Report" will automatically be transmitted to the participating divisions, CAMs who have headquarter responsibilities and to your printer.
For "Customized Summary Report", see page 7 for instructions.

REMINDER:
- If the SMS item allocations are at a higher level than division, the division totals will be summarized at the higher level and transferred at that same level. The adjustments must be made at the higher level as well.
- If the quantity field does not allow you to change the units of SKUs, these quantities have been protected because account quantities have been previously transferred for this promotional item/drive period.

51846 6781

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Please review the following set of procedures before using the BSGSF transfer function.

II. VAP TRANSFER - BSGSFs

Step 1: Select "**Master List**" from SIS menu.
Step 2: Enter function "M40" - VAP function.
Step 3: Enter "M41" (BSGSF Product).
Step 4: Enter *"VAP Wholesaler Number" for the direct account assembling/delivering the promotion you are transferring items for.* (The VAP Wholesaler Number entered must be a valid direct account in your geographic location.)

```
WKPM41N1            VALUE ADDED QUANTITY TRANSFER
                           (BSGSF PRODUCT)

PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

     PROM   PROMOTION DESCRIPTION   PROM    PROMO.DESCRIPTION
     ------ --------------------    ------  -----------------
   _ 950    SPECIAL PROMOTION     _ 999     BALANCE OF ORDER
   x 300230 WIN. B1CG5 FREE PKS Q1 _ 300296 VAN. B3G2F 1ST/2ND QTR
   _ 300312 VAN. B1CTN/G5F-1ST &  _ 300316 NOW 1ST QTR B1G1F
   _ 300338 MORE 1ST QTR B1G1F    _ 300478 VAN. B1G1F 1ST/2ND QTR

Enter
```

Step 5: Select with an "X" the BSGSF Promotion you are transferring and press enter.

```
WKPM41N1           VALUE ADDED QUANTITY TRANSFER
                         (BSGSF PRODUCT)
PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

  PROM     PROMOTION DESCRIPTION       PROM    PROMO.DESCRIPTION
  ------   --------------------      -----   -----------------
  950      SPECIAL PROMOTION         _ 999     BALANCE OF ORDER
  300230   WINS. B1CG5 FREE PKS Q1   _ 300296  VAN.B3G2F 1ST/2ND QTR

                       DRIVE PERIOD SELECTION
              *******  MARK YOUR SELECTION WITH X  ********

                 x 301-00        _ 302-00        _ 303-00
                 _               _               _

                         PRESS ENTER TO CONTINUE
```

Step 6: Select the drive period you are transferring allocations for with an "X" and press enter. Note: You may only transfer once per drive period/per item/ per account.

```
WKPM41N1            VALUE ADDED QUANTITY TRANSFER
                          (BSGSF PRODUCT)

PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

 PROM     PROMOTION DESCRIPTION     PROM     PROMOTION DESCRIPTION
 ------   --------------------      ------   --------------------
_ 950     SPECIAL PROMOTION       _ 999      BALANCE OF ORDER
x 300230  WIN.B1CG5 FREE PKS Q1   _ 300296   VAN.B3G2F 1ST/2ND QTR

                           IND. TYPE SELECTION
                              PROMOTIONAL: x
                                      VAP: _
```

Step 7: For the BSGSF program selected, you may select "**National Promotional Indicators**" or "**VAP Indicators**" to determine quantities.

Note: **Indicator quantities must be used in order to utilize this function.**

Definitions: **National Promotional Indicators:** Indicators by brand and vehicle in salable units for a two-week time period entered by Sales Reps.
VAP Indicators: Indicators in SKUs which can be used for premium and BSGSF programs only (PP Pack #1, PP Pack #2, PP Pack #3, PP Ctn, PP Extra SKU, VAP Over-ride Qty.). On October 4, the VAP Indicators will no longer be available.

51846 6782

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

II. VAP TRANSFER - BSGSFs (CONTINUED)

```
WKPM42N5 - M42              VALUE ADDED QUANTITY TRANSFER

 WINSTON:
 x WIN BXGXF    _ WIN PKG PREMIUM   _ WIN PKG COUPON   _ WIN PKG VPR
                _ WIN CTN PREMIUM   _ WIN CTN COUPON   _ WIN CTN VPR
  CAMEL:
 _ CAM BXGXF    _ CAM PKG PREMIUM   _ CAM PKG COUPON   _ CAM PKG VPR
                _ CAM CTN PREMIUM   _ CAM CTN COUPON   _ CAM CTN VPR
 SALEM:
 _ SAL BXGXF    _ SAL PKG PREMIUM   _ SAL PKG COUPON   _ SAL PKG VPR
                _ SAL CTN PREMIUM   _ SAL CTN COUPON   _ SAL CTN VPR
```

Step 8: Select the indicator with an "X" for the type of promotion you are transferring allocations.

```
WKPM42N3    18 OF  230    VALUE ADDED TRANSFERS

                                             VAP
 TERR    ACCT    NAME            CITY     WHOLESALER   UNITS    SKU
 ----   ------  ----------      -------   ----------  --------  -----
 212402  98814  FOOD LION #99   LOUISBURG   510056      _20       1
 212402 225605  ROSES #434      WAKE FOR.   510056      _20       1
 212402 193757  WINN DIXIE 807  LOUISBURG   510056      _20       1
 212402 300579  WINN DIXIE 845  ZEBULON     510056      _20       1

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
      PREV  BEGIN QTY   SUMM  UPD   ACCT                     MENU
```

Step 9: A scroll list of accounts assigned to the VAP wholesaler you entered will be displayed.

- If you selected "National Promotional Indicators" for a BSGSF program, the salable units & SKUs for each account will be displayed.
- If you selected "VAP Indicators", the SKUs will be displayed for each account.

```
WKPM42N3    18 OF  230    VALUE ADDED TRANSFERS

                                             VAP
 TERR    ACCT    NAME            CITY     WHOLESALER   UNITS    SKU
 ----   ------  ----------      -------   ----------  --------  -----
 212402  98814  FOOD LION #99   LOUISBURG   510056      _20       1
 212402 225605  ROSES #434      WAKE FOR.   510056      _20       1
 212402 193757  WINN DIXIE 807  LOUISBURG   510056      _20       1
 212402 300579  WINN DIXIE 845  ZEBULON     510056      _20       1

                         INPUT OPTIONS
                  _ USE DEFAULT QUANTITIES: ____
                  _ USE PERCENT DECREASE:   ____
                  X TIME PERIOD IN WEEKS:    4
                                    PF5 = ESCAPE

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
      PREV  BEGIN QTY   SUMM  UPD   ACCT                     MENU
```

Step 10: (Optional) If you need to make mass adjustments to the indicator quantities for Value-Added Transfer, select the "PF3" key. The options are:

USE DEFAULT QUANTITIES: Enter default quantity to be given to each account. The quantity entered cannot exceed the salable units currently displayed.

USE PERCENT QUANTITIES: Enter the percent to decrease each quantity. No account can be reduced to "0".

TIME PERIOD IN WEEKS: The salable units displayed are a two-week time period. Enter the number of weeks the promotion will be worked (max. no. is 6 weeks).

PF6 allows you to jump to specific account.

51846 6783

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

II. VAP TRANSFER - BSGSFs (CONTINUED)

WKPM41N9 VALUE ADDED TRANSFERS (BXGXF)

PROM: 300230 WINSTON B1CG5 FREE PKS Q1
Period: 301-00

DIVISION	TOTAL SALEABLE UNITS	TOTAL SKUS (20/SKU)	WINSTON GRATIS (CASES) BALANCE	WINSTON 100 GRATIS (CASES) BALANCE
2124XX	800	40	100	100
2126XX	1200	60	500	500

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
PREV BKWRD FWRD LEFT RIGHT MENU

Step 11: (Optional)
Select the PF4 key for summary screen of total **cases available** for transfer for each division. The "Total Saleable Units" Column represents the actual number of total units required for those accounts in the division. The "Total SKUs" represents the number saleable units : 20. The "balance" column is the number of **cases** each div.has available by brand style. (Press PF7 to shift left or PF8 to shift right to view additional brand styles.)
When you have completed the review, press PF1 to return to previous screen.

WKPM41N9 VALUE ADDED TRANSFERS (BXGXF)

PROM: 300230 WINSTON B1CG5 FREE PKS Q1
Period: 301-00

DIVISION	TOTAL SALEABLE UNITS	TOTAL SKUS (20/SKU)	WINSTON GRATIS (CASES) ADJUST	WINSTON GRATIS (CASES) BALANCE	WINSTON 100 GRATIS (CASES) ADJUST	WINSTON 100 GRATIS (CASES) BALANCE
2124XX	800	40	1	99	1	99
2126XX	1200	60	2	498	2	498

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
PREV BKWRD FWRD LEFT RIGHT CMND

Step 12:
Select the PF5 Key for "Transfer Worksheet".
This screen provides you a summary of the "Total Saleable Units" and the total SKUs and the balance of cases available by divisions.
You must enter the number of cases required for the transfer under the "Adjust" column for each brand style. (Press PF7 to shift left or PF8 to shift right to view additional brand styles.)
Note: Due to the numerous BSGSF configurations, case requirements are not automatically calculated. A guideline to follow is: **12M case= 300 B1G1F offers.**
- Press "PF5" when you are ready to submit the transfer or PF1 to abort the transfer. The list of accounts you have transferred allocations for will be saved for viewing or printing.
- This transfer is **automatically** made in the "Promotional Product Allocation" system and is allocated to the VAP account level.
- You have completed the transfer process. The "Transfer Allocation Report" will **automatically** be transmitted to the participating divisions, CAMs who have headquarter responsibilities and to your printer. For customized report, see page 7 for instructions.

REMINDER
If the adjust field does not allow you to change the units of SKUs, these quantities have been protected because account quantities have been previously transferred for this promotional item/drive period.

51846 6784

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Please review the following set of procedures before using the **Customized Summary Report.**

III. CUSTOMIZED SUMMARY REPORT OF VAP TRANSFERRED PROMOTION(S)

Step 1: Select "Master List" from SIS menu.
Step 2: Enter function "M01" - Master List Selection menu.
Step 3: Select accounts you wish to view or print.

```
Displayed: 15      of 182      Account Scroll - M03
=============================                    Page 1  of
7
Acct   Name                Address             City           Chain Id   WCV
=====  ==================  ==================  =============  ========  =====
305462 JEFF'S GROCERY      RT. 1,HWY.268 E.    PINNACLE                  100
098071 JT'S 52 GULF        RT 1 COOK SCH.RD    PILOT MTN          1589   100
302255 DOWELL BROS         2038 ROCKFORD       MT AIRY        17110336   500
269447 GANT OIL #4         HWY. 89             MT. AIRY       03360111   100

NOTE:'X' Accts to View Detail,'A' in Top Acct to view all Selected
Accts
PF1 = Account Selection Menu  PF2 = Begin of Acct Group
PF10 = Left   PF11 = Right   PF9 = Contracts      Next Function<?>: M73
```

Step 4: The scroll list of accounts which you selected will appear on the screen. Enter M73 in the next function key.

```
WKPM73N1 - M73                  VAP ACCOUNT LISTING

            Please Enter One Of The Following:

                  Program Number: 300275

                          OR

          X  ENTER 'X' TO SELECT ALL PROGRAMS
                                              NEXT FUNCTION: ___

             PF1 ==> RETURN TO MAIN MENU
```

Step 5: Enter the program number. or Enter "X" to select all programs. (If the "all" option is selected, the display will be by territory and will break by account. The print option is not available for "all".) Press enter.

```
WKPM73N1 - M73                  VAP ACCOUNT LISTING

                              DRIVE PERIOD SELECTION
          *******  MARK YOUR SELECTION WITH X    ********

                 X   301-00           ___  302-00
                ___                   ___
                ___                   ___
                ___                   ___

                           PRESS ENTER TO CONTINUE

             PF1 ==> RETURN TO MAIN MENU
```

Step 6: Select with an "X" the specific drive period and press enter.

```
WKPM73N2 - M73                  VAP ACCOUNTS LISTING

 PROGRAM NUMBER: 300275    DRIVE PERIOD:  Jan 03
  VAP
WHSLER   ACCT   TERR    NAME            CITY           ITEM    QUANTITY
------  ------  ------  -------------   ------------   ------  --------
510056  305462 212602   JEFF'S GROCERY  PINNACLE       219991     20
510056  098071 212602   JT'S 52 GULF    PILOT MTN      219991     20
510056  302255 212602   DOWELL BROS     MT AIRY        219991     20
510056  269447 212602   GANT OIL #4     MT. AIRY       219991     20
     PF1 ==> RETURN          PF5 ==> PRINT
```

Step 7: The summary will appear on the screen. You may "print screen" or press PF5 for print options.

51846 6785

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

III. CUSTOMIZED SUMMARY REPORT OF VAP TRANSFERRED PROMOTION(S) (CONTINUED)

```
REPORT DESTINATION: 9700                NO OF COPIES: 01

 You may choose the sequence and page break criteria for your report.
 Use 1 thru 9 to indicate priority of SEQUENCE (1=highest, 9=lowest)
 Use X's to indicate where you would like PAGE BREAKS to occur
 If these selections are ignored, standard defaults will be taken.

    SELECT SORT CRITERIA     5  SALES LEVEL      3  STATE
    (1=highest 9=lowest)     4 CITY              1  TERRITORY/ROUTE
                             6  ACCOUNT NUMBER   2  TAX JURISDICTION

    SELECT PAGE BREAKS       _  SALES LEVEL      X  STATE
    (use X's to select)      _  CITY             X  TAX JURISDICTION
                             X  SUPPLIER         _  CHAIN ID

              PF1 ==> ESCAPE
```

Step 8:

Enter Report Destination and Number of Copies required.

The select Sort Criteria may be requested by entering numbers 1 up to 6 according to your preference of the layout of the report. Enter 1-6 to determine the sort sequence your report will be printed in. In the example on the left, this report will be printed in the following sequence.

- Territory/Route
- Tax Jurisdiction
- State
- City
- Sales Level
- Account Number

Note: Although six sort criteria categories are available, the instructions on the screen indicate 9 for future categories that may be needed.

Enter "X" on the categories you need "page breaks". Press enter.

51846 6786

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Please review the following set of procedures before using the **Mass Update Wholesaler Numbers**.

IV. MASS UPDATE VAP WHOLESALER NUMBERS FOR MASTER LIST ACCOUNTS

Step 1: Select "**Master List**" from SIS menu.
Step 2: Enter function "M01" - Master List Selection menu.
Step 3: Select accounts to update.

Displayed: 15 of 620 Account Scroll - M03

Page 1 of 4

	Acct	Name	Address	City	Chain Id	WCV
_	519929	AMOCO FOOD SHOP#23	325 ROOSEVELT AVE.	WAKE FOREST	3908	105
_	300708	COOKES GROCERY	103 WHITE STREET	WAKE FOREST		100
_	558555	WAKE FOREST DELI&G	711 N. MAIN STREET	WAKE FOREST	54583390	100
_	897645	COUNTRY CORNER GROC	604 JONES DAIRY RD	WAKE FOREST		75
_	300627	VARIETY PIC-UP #37	135 W. MAIN ST.	YOUNGSVILLE		172

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to view all Selected Accts
PF1 = Account Selection Menu PF2 = Begin of Acct Group
PF10 = Left PF11 = Right PF9 = Contracts Next Function<?>: M76

Step 4:
The scroll list of accounts which are to be updated appear on the screen. Enter M76.

WKPM76N1 MASS UPDATE VAP WHOLESALER ID

ENTER VAP WHOLESALER ACCOUNT: 510056

ACCOUNTS SELECTED: 620

PF1==>RETURN

Step 5:
Enter the VAP wholesaler number for the account you selected from scroll list. **Press enter.**

WKPM76N1 MASS UPDATE VAP WHOLESALER ID

ENTER VAP WHOLESALER ACCOUNT: 510056 TAYLOR OIL CO. HDQTR

ACCOUNTS SELECTED: 620
ACCOUNTS UPDATED: 620

************ UPDATE COMPLETED **************

PF1==>RETURN

Step 6:
"Confirmation of Update" - The Wholesaler Account information is automatically updated.

51846 6787

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

V. After transfer completion, order premiums, BSGSF or regular product for promotional use to appropriate direct accounts (see Chapters 3 and 4). Ordering is done by Coordinator, except in Direct Chains where CAMs handle, if necessary.

VI. Communicate program details to each direct account. To assist in accomplishing this frequent task, develop standardized "VAP Promotion Profile Packet" for use in communicating with wholesaler. This packet should contain form letters, spreadsheets, etc. which indicate:

- Promotion description
- Shipped Quantities
- SKU packing
- Type of offer (i.e., 2 pack, 3 pack, 4 pack, etc.)
- Packing instructions
- Arrival date
- Scroll detail of retail accounts to receive shipment (by state if more than one state being shipped to)
- Billing date, EFTs amount, ship date
- Cube, *if necessary*
- Weight, if necessary

This packet should be utilized as required by direct accounts. Following are sample pages from the VAP Promotion Profile Packet.

51846 6788

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Page 1

RJReynolds Tobacco Company

March 23, 1993

Mr. Frank N. Stein
Minter-Weisman Co
1035 Nathan Lane North
Minneapolis, MN 554411

Subject: Camel Special Light Buy One Get One Free - Ship Date 4/19/93

Dear Frank,

R.J. Reynolds will be working a Buy One Get One Free promotion on Camel Special Lights under our Value Added program. Displays should be shipped the week of 4/19/93. Listed below are the details of this promoton.

Case Codes:		
	Camel Special Lt. Box KS	66640
	Camel Special Lt. Box 100	66740
	Camel Special Lt SP	66540

Product Quantities:

State	Box KS	Box 100	SP KS	EFT $	Ships
Illinois					
Indiana					
Iowa					
Michigan					
Minnesota	54	54	36	49383.69	4/1/93
Nebraska					
North Dakota					
South Dakota					
Wisconsin					
Sales Rep (MN)	22	25	7	SEE MN	4/1/93

State Breakdown:

State	# of Displays
Illinois	
Iowa	
Indiana	22
Michigan	
Minnesota	3
Nebraska	769
North Dakota	22
South Dakota	35
Wisconsim	192

51846 6789

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Page 2

March 23, 1993
Page Two

Packing: Packing for this display will consist of the following:

- 3 cartons Camel Special Lt Box BIGIF
- 3 cartons Camel Special Lt Box 100 BIGIF
- 2 cartons Camel Special Lt SP BIGIF

Each display holds 40 BIGIF units. Product should be removed from the white cartons and packed in a specially designed sleeve. These sleeves are packed 40 per box and this box will serve as a shipper for the display. Sleeves will arrive approximately at same time as the product.

Attached is a Value Added Contract that indicates how much you will earn for packing this promotion. We appreciate your participation in this program. If you have any questions regarding this information, please do not hesitate to call.

Sincerely,

Holly W. Woo

Holly W. Wood
Personnel & Administration Manager
6432 Cecilia Circle
Bloomington, MN 55439
Phone (612) 841-4905
Fax: 612 941-4906

51846 6790

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Sample Addendum

RJReynolds Tobacco Company

ADDENDUM TO VALUE ADDED PROGRAM MASTER CONTRACT BETWEEN JOE'S WHOLESALE COMPANY AND RJRT

Promotional Quantities/Requirements/Outline

R.J. Reynolds Tobacco Company will ship 144 cases of Camel Special Light BIGIF product into Joe's Wholesale Company. This product should be packed in shipping cases to the appropriate specifications and shipped to designated accounts.

Promotional Delivery Timeframes - (1) to Distributor from RJRT and (2) to Retailer from Distributor:

Product will be delivered to your warehouse April 1, 1993 for distribution the week of April 19, 1993.

Designated Retailers:

R.J. Reynolds Tobacco Company will provide an account list to the distributor for shipment the week of April 19., 1993.

RJRT shall pay the Distributor payment at the rate of $9.00 per 12M BIGIF case (144 cases of BIGIF 12M cigarettes x $9.00 = $1,296.00)

RJRT REPRESENTATIVE

Name Holly W. Wood

Title Personnel & Administration Manager
Region Operations Office

Date: March 23, 1993

© R.J. Reynolds Tobacco Company 1993

51846 6791

Sample VAP Account Scroll List Detail

GHC726BN

VAP ACCOUNT SCROLL LIST DETAIL REPORT
WATSON 6320
WATSON COMPANY, INC 325249

SUPPLIER	ACCOUNT	YEAR	NAME	ADDRESS	CITY	ST	PP#1	PP#2	PP#3	EXTRA SKUS	PP TOTAL	VAP OVR	VAP ALLOC	DIV ALLOC
337220	451739	633607	COUNTRY LINE LIQUOR	6623 N LAKE BLVD	FOREST LAKE	MN	0	0	0	0	0	0	0	0
416550	542106	633607	NORTHBOUND LIQUOR	50 MAIN STREET	ELK RIVER	MN	1	0	0	0	1	0	1	0
	966161	633607	CENEX CONVENIENCE	13374 WEST HWY 10	ELK RIVER	MN	1	0	0	0	1	0	1	0
	950125	633607	PRINCETON TOWN MKT	311 N LA GRANDE	PRINCETON	MN	0	1	0	0	2	0	2	0
	400327	633607	BOBS COUNTRY EXPRESS	JCT 159 & 95 BOX 314	PRINCETON	MN	1	0	0	0	1	0	1	0
	074158	633607	MURRAYS CORNER STORE	34030 NELSON ST NW	PRINCETON	MN	0	1	0	0	2	0	2	0
577570	237473	633607	SHORT STOP SUPERETTE	PPT3	GRAND RAPIDS	MN	1	0	0	0	1	0	1	0
362231	437305	633607	COLONIAL LIQUOR	35 N LAKE ST	FOREST LAKE	MN	1	0	0	0	1	0	1	0
72000	560349	633607	WARREN'S PLACE	155 1ST STREET SW	MILLHAVEN	MN	1	0	0	0	1	0	1	0
					TOTAL ACCOUNTS -	9	6	2	0	0	10		10	0
					TOTAL ACCOUNTS -	9	6	2	0	0	10		10	0

VIII. Follow-up via phone with direct account to determine status, excess promotions, etc. As problems arise with excess promotions, Coordinator will contact appropriate RJR Chain Account Managers to make arrangements to ship excess promotions as possible.

51846 6792

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6793

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ORDERING BSGSFS

Preliminary Activities

- Develop spreadsheets noting all Region direct accounts, SIS numbers and contact people
- Develop spreadsheets indicating sales reps and direct accounts to which the product(s) should be shipped

Procedures

I. Gather Ship-to and quantity information for order processing. Refer to Workplan Book and VAP needs to obtain quantities.

II. Gain approval from direct account to ship promotional product, if required. This would also include obtaining purchase order number, if required. This approval and PO number is obtained by calling the direct account.

III. Where necessary, calculate state breakouts prior to ordering. Company guidelines require breaking up orders into separate "by state" orders when incoming BSGSF product will be shipped to more than one state.

Each state maintains different levels of taxation on cigarettes, and RJR reimburses Direct Accounts for tax stamps used on gratis product.

- For example, direct account XYZ has been allocated 20 cases of BIGIF product. It will be shipping 1/2 of this product to Wisconsin and 1/2 to Minnesota. In order to ensure the Direct is properly reimbursed for tax stamps on the gratis product, the order must be broken up into two separate 10 case orders — one to Wisconsin and one to Minnesota. Unless instructed otherwise, the Order Department will reimburse all tax stamps for gratis product based on the state in which the Direct Account resides.

The Promotional Product Allocation screen is then utilized to officially allocate the product to each Direct Account. In addition, these screens offer several other options to assist with the handling of promotional products (BIGIFs, B2G1Fs, etc.)

- Inquiries by sales level
- Transfer allocations
- Direct Allocation Inquiry by Promotion

Many of these utilities will be utilized when coordinating BSGSF promotions. Note that this system must be accessed and product placed into allocation BEFORE the order can be placed.

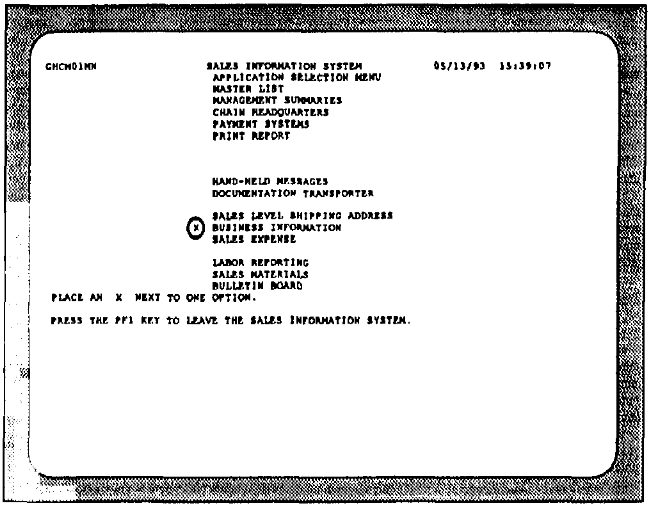
51846 6794

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

USING PROMOTIONAL PRODUCT ALLOCATION SCREENS

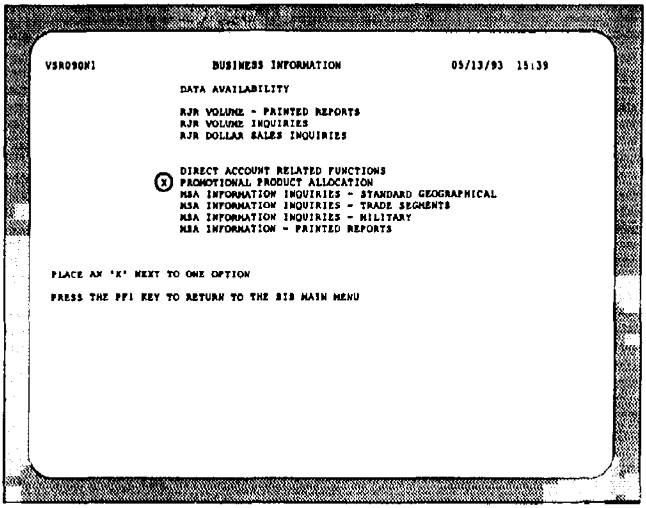
1. With the SIS Main Menu displayed, place an "X" beside BUSINESS INFORMATION and press [ENTER].



51846 6795

© R.J. Reynolds Tobacco Company 1993

2. With this screen displayed, place an "X" beside PROMOTIONAL PRODUCT ALLOCATION and press [ENTER].

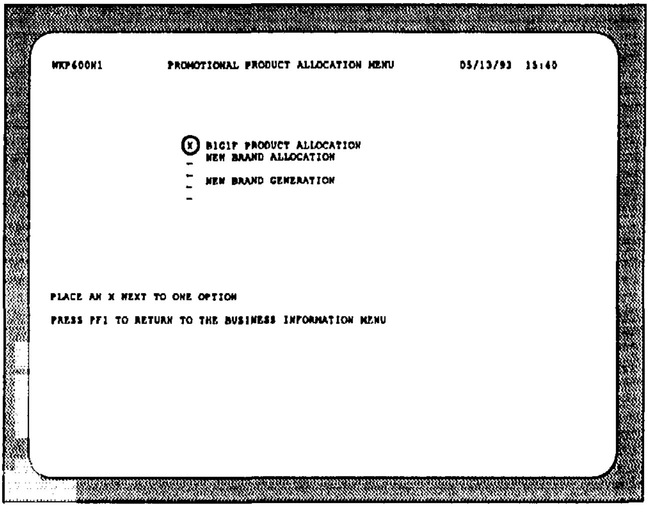


51846 6796

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. With the Promotional Product Allocation Menu displayed, place an "X" beside BIGIF PRODUCT ALLOCATION and press [ENTER].



- *Note:* BIGIF product allocation should be utilized for all BSGSF.

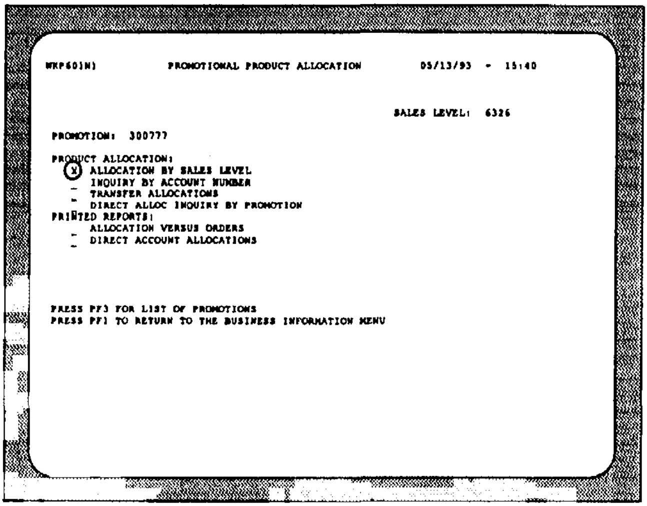
51846 6797

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Allocation by Sales Level

4. The following screen will be displayed. Enter the promotion number in the PROMOTION field and place an "X" beside ALLOCATION BY SALES LEVEL and press [ENTER].



- This selection is made by the PRC to allocate individual cases, by brand style, to each direct account desired.
- Prior to ordering any BSGSF product, this selection **MUST** be utilized.
- If the PRC is in the Region Business Information System, allocations will be shown by Division.
- If in at Division level, allocations will be shown by Direct Account.

51846 6798

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

◆ *Note:* If you don't have the promotions number or you want to display a list of every BSGSF promotions, press [PF3]. The promotions can be obtained from this list. Following is a sample of the screen you receive when you press [PF3]. Press [ENTER] to exit to the previous screen.

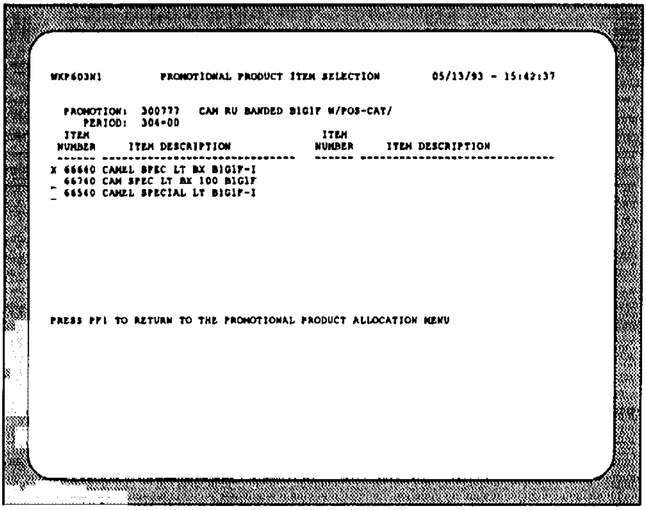
```
WKP601N2          PROMOTIONAL PRODUCT ALLOCATION       05/13/93 -  15:42:00.2

PLACE AN 'X' NEXT TO THE PROMOTION YOU WANT TO SELECT

                PROM        PROMOTION DESCRIPTION          STATUS
                ----   ------------------------------   --------
                 200   SALEM GOLD/CAMEL BIGIF           CLEAN-UP
               _ 226   DORAL FF 100 BIGIF               CLEAN-UP
               _ 230   LENTE BIGIF                      CLEAN-UP
               _ 231   LENTE BIGIF                      CLEAN-UP
               _ 425   SALEM BIGIF                      CLEAN-UP
               _ 432   SALEM BIGIF                      CLEAN-UP
               _ 434   SALEM BIGIF                      CLEAN-UP
               _ 436   SALEM BIGIF                      CLEAN-UP
               _ 437   VANTAGE ULTRA BOX BIGIF          CLEAN-UP
               _ 440   WINSTON BIGIF                    CLEAN-UP
               _ 444   STERLING BIGIF                   CLEAN-UP
               _ 445   CAMEL WIDE BIGIF                 CLEAN-UP
               _

PRESS PF3 TO END SCROLL
PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU
```

51846 6799

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

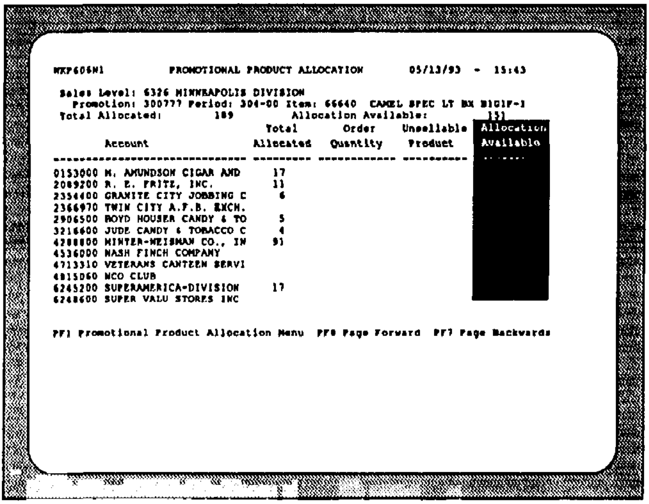
5. From the Promotional Product Allocation screen, the following screen will be displayed. Place an "X" beside the desired brandstyle and press [ENTER].



51846 6800

© R.J. Reynolds Tobacco Company 1993

6. The following screen will be displayed. Input the total amount of cases which need to be allocated to each Direct Account.


WKP606N1 PROMOTIONAL PRODUCT ALLOCATION 05/13/93 - 15:43

Sales Level: 6326 MINNEAPOLIS DIVISION
Promotion: 300777 Period: 304-00 Item: 66640 CAMEL SPEC LT BX B1G1F-1
Total Allocated: 189 Allocation Available: 151

Account	Total Allocated	Order Quantity	Unsellable Product	Allocation Available
0153000 M. AMUNDSON CIGAR AND	17			
2089200 R. E. FRITZ, INC.	11			
2354400 GRANITE CITY JOBBING C	6			
2366970 TWIN CITY A.F.B. EXCH.				
2906500 BOYD HOUSER CANDY & TO	5			
3216600 JUDE CANDY & TOBACCO C	4			
4288800 MINTER-WEISMAN CO., IN	91			
4536000 NASH FINCH COMPANY				
4713310 VETERANS CANTEEN SERVI				
4815060 NCO CLUB				
6245200 SUPERAMERICA-DIVISION	17			
6248600 SUPER VALU STORES INC				

PF1 Promotional Product Allocation Menu PF8 Page Forward PF7 Page Backwards

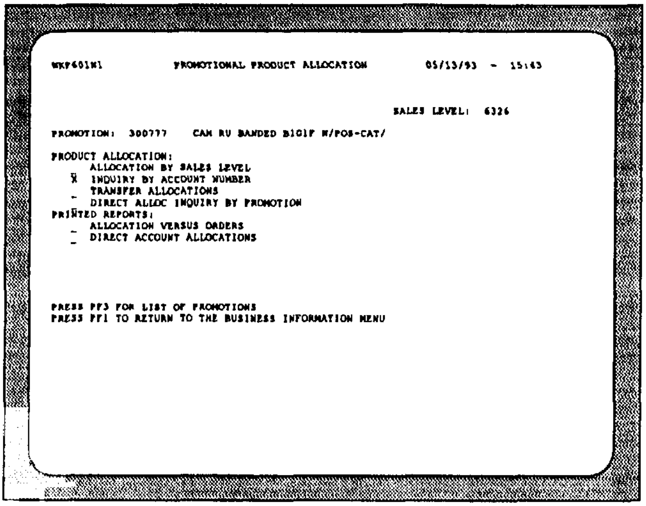
- Allocations are made by typing in quantity desired on the appropriate line in the Total Allocated column and press [ENTER].
- The Allocation Available column will now indicate the total number of cases of the selected brand style available to order.
- When complete and orders are phoned/faxed to Winston-Salem, the amounts allocated will move from the Allocation Available column to the Order Quantity column, which indicates product order has been placed and processed.
- Even if the order is to be broken out by state, the quantity allocated must still remain the total amount needed by the Direct.

51846 6801

© R.J. Reynolds Tobacco Company 1993

Inquiry by Account Number

1. Logon to the BUSINESS INFORMATION SYSTEM as described above. With the Promotional Product Allocation screen displayed, enter the desired promotion and place an "X" in the INQUIRY BY ACCOUNT NUMBER field and press [ENTER].



◆ *Note:* This task is utilized to inquire by account regarding allocated quantities. This selection is utilized to obtain the status of all allocated product for a given Direct Account.

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The following screen will be displayed.

WKP607N1 PROMOTIONAL PRODUCT ALLOCATION 05/13/93 - 15:44:30

ACCOUNT NO. 5516340
ACCOUNT NAME: HUB CITY FOODS, INC.
PROMOTION: 300777 CAN RU BANDED BIGIF W/POS-CAT/
PERIOD: 304-00

ITEM DESCRIPTION	TOTAL ALLOCATED	ORDER QUANTITY	UNSELLABLE QUANTITY	ALLOCATION AVAILABLE
CAMEL SPEC LT BX BIGIF-I	52	52		
CAM SPEC LT BX 100 BIGIF	52	52		
CAMEL SPECIAL LT BIGIF-I	33	33		

PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU

This screen indicates all brands allocated for a given promotion and the status of each.

51846 6803

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Transfer Allocations

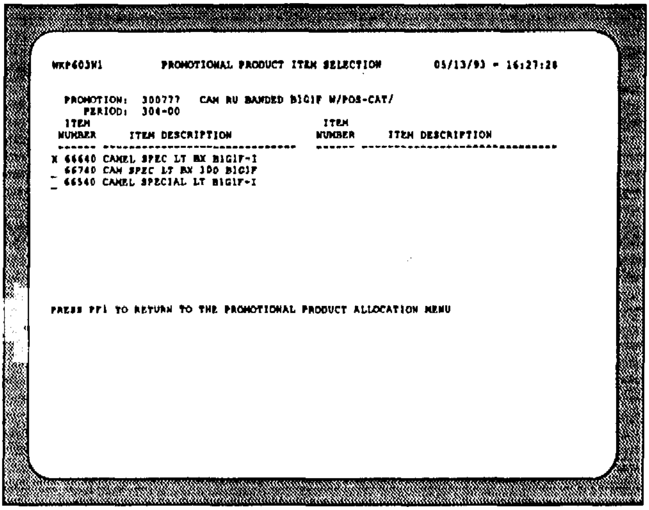
1. Logon to the BUSINESS INFORMATION SYSTEM as described above. With the Promotional Product Allocation screen displayed, enter the desired promotion and place an "X" in the TRANSFER ALLOCATIONS field and press [ENTER].

```
WKP601N1          PROMOTIONAL PRODUCT ALLOCATION        05/13/93  -  15:52

                                                   SALES LEVEL:  6326

PROMOTION:  30077_

PRODUCT ALLOCATION:
  _  ALLOCATION BY SALES LEVEL
  _  INQUIRY BY ACCOUNT NUMBER
  X  TRANSFER ALLOCATIONS
     DIRECT ALLOC INQUIRY BY PROMOTION
PRINTED REPORTS:
  _  ALLOCATION VERSUS ORDERS
  _  DIRECT ACCOUNT ALLOCATIONS


PRESS PF3 FOR LIST OF PROMOTIONS
PRESS PF1 TO RETURN TO THE BUSINESS INFORMATION MENU
```

This screen transfers allocations to other Divisions.

51846 6804

2. The following screen will be displayed. Place an "X" beside the desired item and press [ENTER].



51846 6805

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The following screen will be displayed. Enter the transfer information and press [ENTER].

```
WKP613N1          PROMOTIONAL PRODUCT ALLOCATION          05/13/93  16:34
                       ALLOCATION TRANSFER

 SALES LEVEL: 6326 MINNEAPOLIS DIVISION
   PROMOTION: 300777
      PERIOD: 304-00 ITEM: 66640  CAMEL SPEC LT BX B1G1F-I
 TOTAL ALLOCATED:       189          ALLOCATION AVAILABLE:          0


                  TRANSFER TO SALES LEVEL: ____

                  TRANSFER AMOUNT: ________



PRESS PF1 TO RETURN TO THE PROMOTIONAL PRODUCT ALLOCATION MENU
```

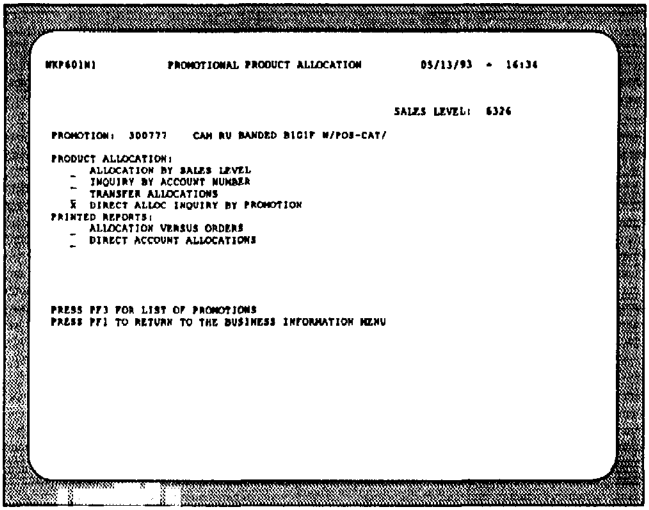
Because the Promotional Product Allocation Transfer screen doesn't track product transfers, this screen must be printed/faxed to appropriate Division on completion. This is the only way an operating unit can be assured a transfer has been completed.

© R.J. Reynolds Tobacco Company 1993

51846 6806

Direct Allocation Inquiry by Promotion

1. Logon to the BUSINESS INFORMATION SYSTEM as described above. With the Promotional Product Allocation screen displayed, enter the desired promotion and place an "X" in the DIRECT ALLOC INQUIRY BY PROMOTION field and press [ENTER].



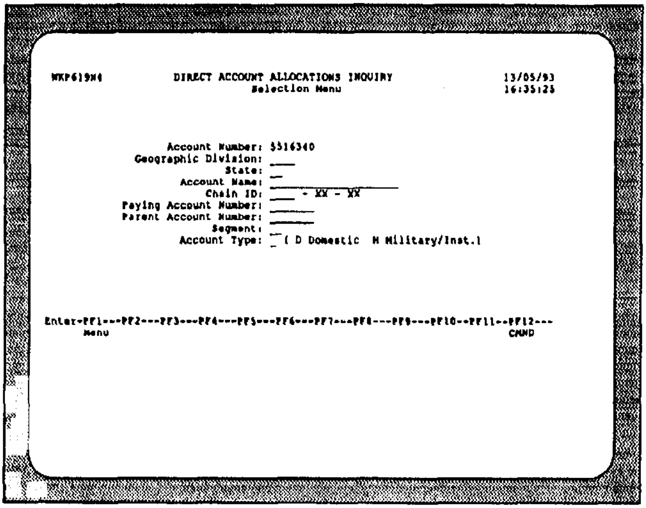
```
WKP601N1          PROMOTIONAL PRODUCT ALLOCATION        05/13/93 - 16:34

                                                  SALES LEVEL:  6326

PROMOTION:  300777    CAM RU BANDED BIGIF W/POS-CAT/

PRODUCT ALLOCATION:
   _  ALLOCATION BY SALES LEVEL
   _  INQUIRY BY ACCOUNT NUMBER
   _  TRANSFER ALLOCATIONS
   X  DIRECT ALLOC INQUIRY BY PROMOTION
PRINTED REPORTS:
   _  ALLOCATION VERSUS ORDERS
   _  DIRECT ACCOUNT ALLOCATIONS


PRESS PF3 FOR LIST OF PROMOTIONS
PRESS PF1 TO RETURN TO THE BUSINESS INFORMATION MENU
```

- *Note:* This screen is utilized to double check the status of all shipments to the direct account in the Region and outside the Region, as necessary.

51846 6807

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The following screen will be displayed. Enter the desired account number in the ACCOUNT NUMBER field and press [ENTER].



✦ *Note:* This screen allows for Direct Account selection to review status of allocated product by a number of different options:

- Account number
- Geographic region
- State
- Account name
- Chain ID
- Paying account number
- Parent account number
- Segment
- Account type

51846 6808

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The following screen will be displayed. Enter the transfer information and press [ENTER].

```
WRP619N1            DIRECT ACCOUNT ALLOCATIONS INQUIRY                 13/05/93
                                                                       16:35:53
Sales Level: XXXX From: 300777 CAM RU BANDED BIG1F W/POS-CAT/
Period: 304-00                                              CAMEL          CAM
                                                             SPEC         SPEC
                                                               LT           LT
                                                               BX           BX
 Div  Account        Name              City      ST  Whse   BIG1F-I        100
 ---- ------- ----------------- ------------ --  ----  ---------- ----------
 6324 5516340 HUB CITY FOODS, I MARSHFIELD   WI   070          52           52



Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Menu         Total Whse                 Bkwrd Fwrd  Left  Right      CMND
```

Placing Orders

IV. Once quantities are finalized and entered into the system, contact Customer Services Department at 1-800-334-8682. This department closes at 4:15 pm EST. A three week lead time is required between order date and first possible ship date.

V. Give the Customer Service Representative the following information:

- Give name and identify self as RJR employee
- Promotion number
- Direct account SIS # (note whether separate orders by state are to be placed)
- Direct account EFT#
- Purchase Order # (if required)
- Delivery date
- Brand style
- Quantity

All information listed above will be confirmed by Customer Service Representatives. They will also provide the total EFT $ amount and EFT bill date, if requested.

51846 6809

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VI. Communicate critical information to each direct account via letter. This letter should be standardized to expedite communication. If promotion is value-added program, the VAP packet will substitute for the letter.

RJReynolds Tobacco Company

March 19, 1993

CLICK DISTRIBUTING CO.
Attn: Bob White
611 George St
La Crosse, WI 54601

SUBJECT: Camel Buy 1, Get 1 Free

Dear Bill:

The Madison District has ordered the followig promotional product to your warehouse. This promotion will be worked out by our Sales Representatives, Wendy Storm and Candy Barr. There will also be some pre-book orders, which will be forwarded to you.

Below is pertinent information for your records:

2 Cases	CAMEL Filter King	BIGIF
2 Cases	CAMEL Filter King Box	BIGIF
4 Cases	CAMEL Light King	BIGIF
4 Cases	CAMEL Filter Wides	BIGIF
1 Case	CAMEL Filter Wides	BIGIF
1 Case	CAMEL Wides Light	BIGIF

Deliver Date set for: March 30, 1993
Purchase Order No.: 030893JJG
Dollar Amount: $3,978.20

If you have any further questions, please feel free to contact me.

Sincerely,

Will Payer

Will Payer

cc. Wendy Storm
Candy Barr

VII. After all orders have been placed, the PRC should recheck the appropriate Promotional Product Allocation screens to:

- Ensure all product has been allocated and ordered.
- Ensure no new allocations have been transferred into the system. If so, these additional quantities must be allocated and ordered.

51846 6810

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6811

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6812

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ORDERING PREMIUMS

Preliminary Activities

- Develop spreadsheets indicating ship-to locations for all sales reps in the Region. Master copy should be present when placing orders.

Task Overview

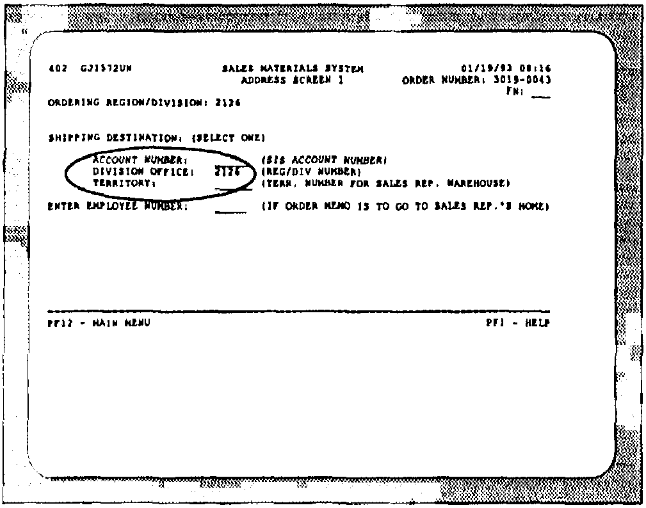
The SMS System provides several ordering functions, each tailored to the requirements of certain type orders:

- SMS 402 is used to fulfill supply requests, place a lone order to a single location, etc.
- SMS 422 is used when ordering the same item in the same quantity to a set of locations. It is most often used in POS, PDI shipment.
- SMS 425 is used to order different quantities of the same items to a set of locations.

Following is a synopsis of each function.

Function 402

1. Log on to SMS and invoke function 402, Order Entry. The following screen is displayed:



2. Enter the appropriate information and press [ENTER]. For demonstration purposes we have entered a Division of 2126.

51846 6813

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The order entry ship-to screen will be displayed:

```
402  GJ1572UN               SALES MATERIALS SYSTEM             02/23/93 10:03
                               ADDRESS SCREEN 2          ORDER NUMBER: 3054-0977
                                                                        FN: ___
ORDERING OFFICE: 2126
**************************************************************************
SHIP TO:  ACCOUNT NUMBER:
          DIVISION OFFICE:  2126
          TERRITORY:
**************************************************************************
SHIP TO ADDRESS:  F. J. ARMSTRONG, JR.
                  8100 NORTH POINT BLVD
                  SUITE B
                  WINSTON-SALEM NC 27105

SALES REP. NUMBER:              SALES REP.:

__________________________________________________________________________
ENTER - CONTINUE WITH ORDER
PF3   - RETURN TO PREVIOUS SCREEN
PF12  - MAIN MENU                                                PF1 - HELP
```

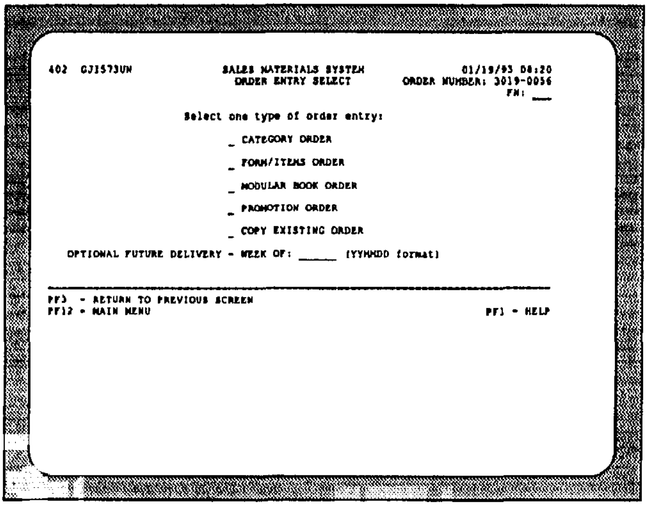
4. Verify that this information is correct.

51846 6814

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Press [ENTER] to continue. The order type selection screen will be displayed:



6. Select the type of order you wish to create:
   - CATEGORY ORDER - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
   - FORM/ITEMS ORDER - Use this option when you know the item number(s) you wish to order.
   - MODULAR BOOK ORDER - Currently unavailable (future enhancement).
   - PROMOTION ORDER - Use this option to order items for a promotion.
   - COPY EXISTING ORDER - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.
7. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the **WEEK OF** field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.

51846 6815

© R.J. Reynolds Tobacco Company 1993

8. Press [ENTER] to continue.

9. The next section contains a summary of the process for using any of the order types. It is followed by detailed instructions for each order type.

Summary of Process

1. At the order type selection screen select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.

2. Press [enter] to continue.

- *If you have requested a Category order:*
  - The system will prompt you to select a major category . For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
  - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
- *If you have requested a Form/Items order:*
  - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].
- *If you have requested a Promotion order:*
  - To view a specific type of promotion, position the cursor in the **TYPE** column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
  - Select the promotion for which you wish to order items
  - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
- *If you are copying an existing order:*
  - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
  - The system will then list the items/quantities associated with the specified order. (This screen is similar to Form/Items Order.) Enter/modify items/quantities for the new order you are creating and press [PF4].

51846 6816

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.

4. If all items requested are in inventory, the Order Completion screen is displayed. If all items are not in inventory the Inventory Exceptions screen is displayed.

5. From either screen you can request special handling.

6. When you are ready to process the order, press the appropriate PF key ([PF4] from the Order Completion screen; [PF4] or [PF5] from the Inventory Exceptions screen).

51846 6817

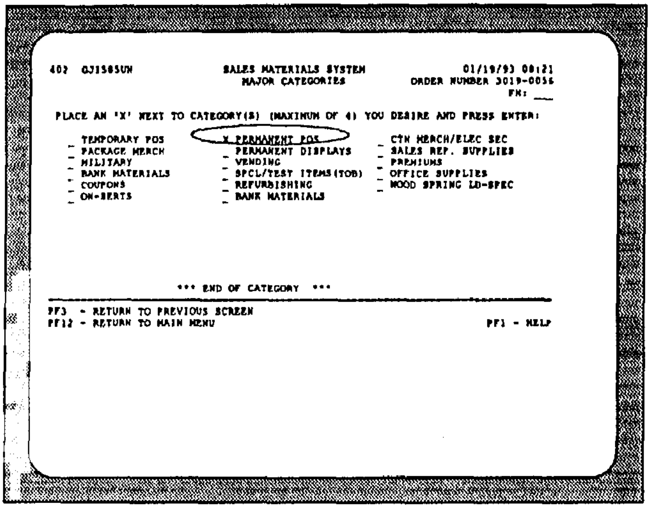
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Category Order

Use this option when you want to select the items to be ordered by category, such as permanent POS items, premiums, coupons, etc.

1. When Category Order is selected, the Major Categories screen is displayed:



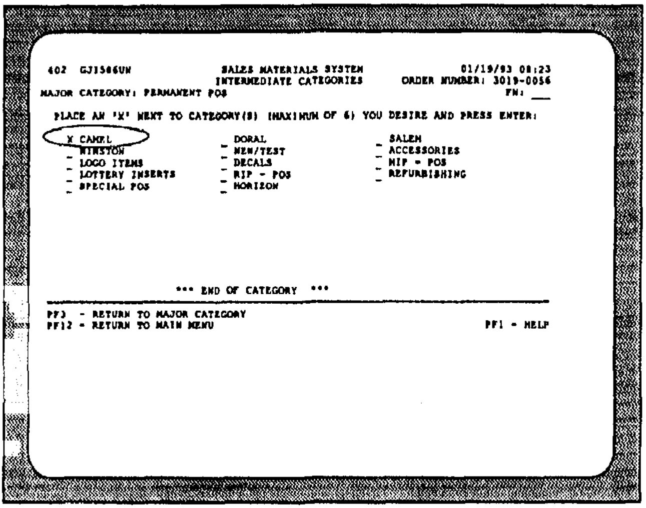
2. Enter X beside the categories you wish to select from. Up to 4 categories can be selected at one time.

3. Press [ENTER] to continue.

51846 6818

 © R.J. Reynolds Tobacco Company 1993

4. The Intermediate Categories screen is displayed for the first major category selected:

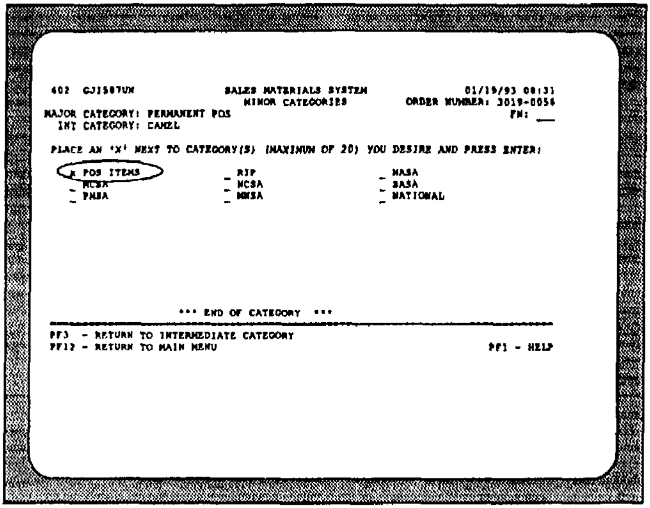


5. Enter X beside the categories you wish to select from. Up to 6 categories can be selected at one time.

6. Press [ENTER] to continue. If multiple major categories were selected, intermediate categories for the next major category will be displayed. This process will continue until intermediate categories have been selected for each major category.

51846 6819

7. When intermediate categories have been selected for each major category, the Minor Categories screen is displayed. This screen lists minor categories for the first major/intermediate category combination:



8. Enter X beside the categories you wish to select from. Up to 20 categories can be selected at one time.

9. Press [ENTER] to continue. If multiple intermediate categories were selected or multiple major categories were selected, minor categories for the next intermediate category will be displayed. This process will continue until minor categories have been selected for each major/intermediate category combination.

51846 6820

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

10. When minor categories have been selected for all major/intermediate categories, the system will list the items associated with the category combinations requested. This list will begin with the first major/intermediate/minor category specified:

```
402  GJ1587U1                  SALES MATERIALS SYSTEM              01/19/93 08:31
                                ITEM QUANTITY ENTRY       ORDER NUMBER: 3019-0056
MAJOR CATEGORY: PERMANENT POS
  INT CATEGORY: CAMEL
MINOR CATEGORY: POS ITEMS                           MAXIMUM ORIGINAL  L   REMAIN
 BK                                                   ORDER    ALLOC  E    ALLOC
QTY   ITEM  ---DESCRIPTION----------  UNITS/SKU        QTY      QTY  V      QTY
___  208353 CAMEL 3-D CIGARETTES SOL     10 BOX                   0            0
___  208408 CAMEL BUSINESS HOURS OPE     10 BOX                   0            0
___  390898 CAMEL BATTERY CLOCK           6 BOX                  10  D        10
___  390920 CAMEL FLOOR ASHTRAY           2 BOX                  10  D        10
___  390942 CAMEL LANE CLOSED            20 BOX                  15  D        15
___  390964 CAMEL NEON                    1 BOX                  15  D        15
___  391030 CAMEL PRICING BANNER 6'X     25 BOX                   2  D         2
___  391063 CAMEL GROUND MOUNT            1 BOX                  10  D        10
___  391074 CAMEL POLE MOUNT              1 BOX                  22  D        22
___  391085 CAMEL CURB MOUNT              1 BOX                   5  D         5

                      *** MORE DATA EXISTS ***
---------------------------------------------------------------------------------
PF3 - PREVIOUS SCREEN
PF4 - CONTINUE WITH ORDER                                       PF12 - MAIN MENU
PF7 - START OF DATA                                             PF1  - HELP
```

11. For each item, this screen indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).

12. Specify the quantity of each item you wish to order in the QTY field. If you do not want an item, leave the quantity field blank. If multiple pages of items exist, press [ENTER] to scroll forward.

13. If you have specified more than 1 major, intermediate or minor category, there will be a screen like this for each combination. Press [ENTER] to view additional screens of information and enter quantities.

14. When you have entered quantities for the desired items, press [PF4] to continue with the order.

51846 6821

© R.J. Reynolds Tobacco Company 1993

15. The system now displays the order for you to review:

```
402  GJ1504UN              SALES MATERIALS SYSTEM              01/19/93 08:32
                               ORDER REVIEW            ORDER NUMBER: 3019-0056

                                                     MAXIMUM ORIGINAL  L   REMAIN
 SKU   (LINES 1 - 2 OF 2 SHOWN)                        ORDER    ALLOC  E    ALLOC
 QTY   ITEM  DESCRIPTION------------  UNITS/SKU         QTY      QTY  V      QTY
 1___  200353 CAMEL 3-D CIGARETTES S     10 BOX                    0           0
 1___  200400 CAMEL BUSINESS HOURS O     10 BOX                    0           0

______________________________________________________________________________
(*) ASTERISKS INDICATE THAT THE MAXIMUM ORDER QTY WAS ORIGINALLY EXCEEDED
PF3  - RETURN TO PREVIOUS SCREEN     PF7 - SCROLL UP
PF4  - CONTINUE WITH ORDER           PF8 - SCROLL DOWN
PF12 - MAIN MENU                                                   PF1 - HELP
```

16. This is the SMS Order Review screen. It displays the required SKU quantity of each item requested and units per SKU. It also indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).

17. As with the previous screen, you can modify the quantities indicated.

18. When you are ready to continue with the ordering process, press [PF4] to continue with the order entry process.

51846 6822

© R.J. Reynolds Tobacco Company 1993

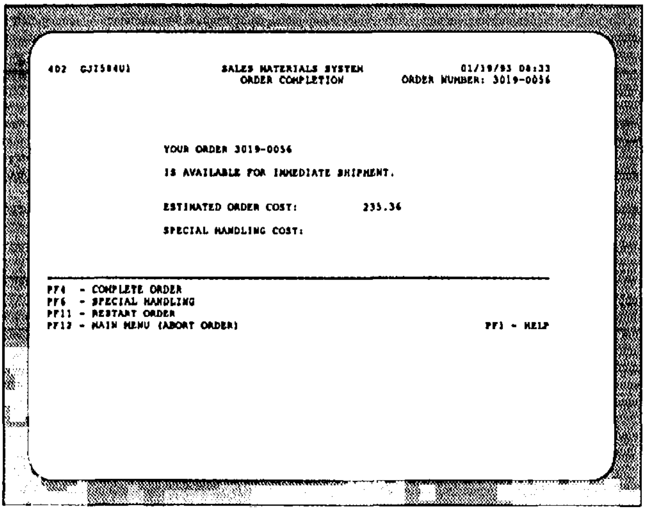
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

19. The system now checks the inventory to determine if all of the items needed are available. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder. This screen allows you to:

- Continue with this order and put the missing items on back order
- Continue with this order and cancel items on back order
- Suspend the order, reserving inventory for the available items
- Cancel the order

(This screen is shown in the discussion on entering a promotion order.)

20. If all items *are in inventory*, the system will display the Order Completion screen:



21. This screen provides you with your order number and cost.

WARNING: This is the point of no return! If you go forward from here, an order will be generated.

51846 6823

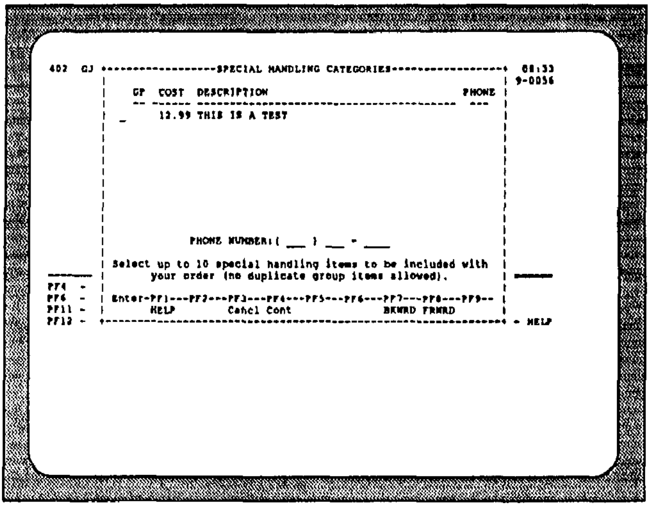
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

22. From this screen you can:

- Press [PF4] to continue with the order entry process. This should only be used if you are sure you want to generate the order!
- Press [PF6] to request special handling.
- Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
- Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

23. If you need to request special handling, press [PF6]. The system will display a list of options for you to select from:



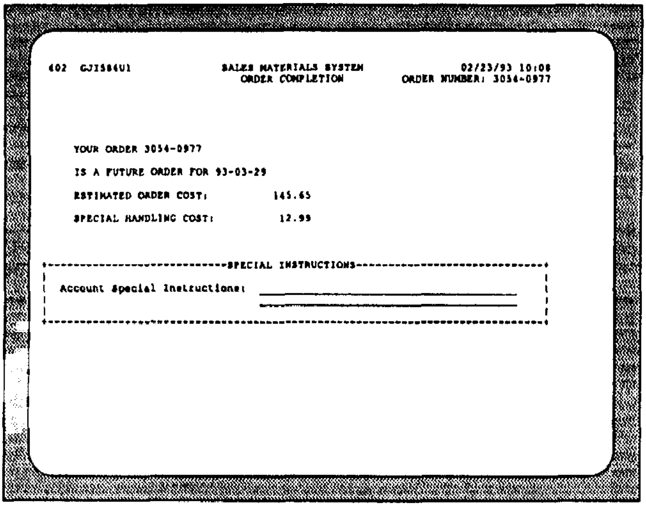
24. Enter X beside each option needed. Up to 10 options can be selected. When you are ready to continue, press [PF4]. The system will return to the Order Completion screen and display the handling costs.

51846 6824

© R.J. Reynolds Tobacco Company 1993

25. If you wish to generate the order press [PF4]. Otherwise, use one of the other options.

26. When [PF4] is pressed, the following pop-up window will be displayed:



```
402  GJIS84U1            SALES MATERIALS SYSTEM           02/23/93 10:08
                             ORDER COMPLETION         ORDER NUMBER: 3054-0977

     YOUR ORDER 3054-0977

     IS A FUTURE ORDER FOR 93-03-29

     ESTIMATED ORDER COST:          145.65

     SPECIAL HANDLING COST:          12.99

+---------------------------SPECIAL INSTRUCTIONS-----------------------------+
|                                                                            |
|  Account Special Instructions: ________________________________            |
|                                ________________________________            |
+----------------------------------------------------------------------------+
```

27. Enter any special instructions or sales rep information in the space provided. This entry is optional. (This information was previously entered on the Address Screen, but was moved due to processing procedures.)

28. When you are ready to continue, press [ENTER]. The order is generated and the following screen is displayed:

51846 6825

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
GJI570U1                  SALES MATERIAL SYSTEM                   12/17/92
                          ORDER ENTRY COMPLETED     ORDER NUMBER: 3019-0056


  YOUR ORDER 3019-0056 HAS BEEN SUCCESSFULLY PROCESSED.


   ESTIMATED ORDER COST :      605.66

   SPECIAL HANDLIGN COST:       12.99


****************************************************************************
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS
  PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS
 PF12 - RETURN TO MAIN MENU
```

29. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

30. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

51846 6826

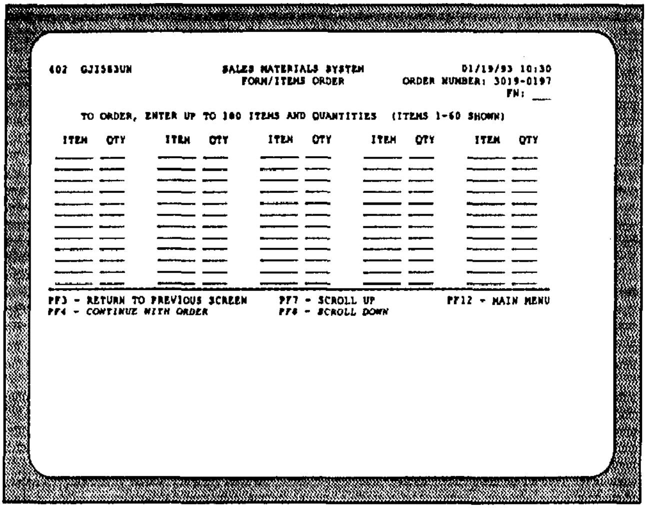
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Form/Items Order

Use this option when you want know the item numbers of the items you wish to order. *It allows you to enter the item numbers/quantities directly.*

1. When Form/Items Order is selected, the following screen is displayed:



2. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.

3. Press [PF4] to continue. The Order Review screen will be displayed.

   On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

51846 6827

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The system now checks the inventory to determine if all of the items needed are available.

   - If any of the requested items are *not currently in inventory,* a screen will be displayed which lists the items/quantities that will be placed on back-order.

     WARNING! This is the point of no return! If you go forward from here, an order will be generated!

   - If all items *are in inventory,* the system will display the Order Completion screen. This screen provides you with your order number and cost.

     WARNING! This is the point of no return! If you go forward from here, an order will be generated!

5. If you have reached the Order Completion screen, the same options are available as for the Category order type:

   - Press [PF4] to process this order. This should only be used if you are sure you want to generate the order!
   - Press [PF6] to request special handling.
   - Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
   - Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

6. When you are ready to generate the order, press [PF4]. The order is generated and the following screen is displayed:

51846 6828

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
GJ1578U1                SALES MATERIAL SYSTEM                 12/17/92
                        ORDER ENTRY COMPLETED      ORDER NUMBER: 3154-1307


  YOUR ORDER 3154-1307 HAS BEEN SUCCESSFULLY PROCESSED.


   ESTIMATED ORDER COST :        145.65

   SPECIAL HANDLIGN COST:



******************************************************************************
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS
  PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS
 PF12 - RETURN TO MAIN MENU
```

7. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

8. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

© R.J. Reynolds Tobacco Company 1993

51846 6829

Promotion Order

Use this option when you wish to order items for a particular promotion.

1. When Promotion Order is selected, the Promotion Selection screen is displayed:

407 GJ0175UN — SALES MATERIALS SYSTEM — 01/19/93 10:50
PROMOTION SELECTION — ORDER NUMBER: 3019-0197
List from: 200302 — FN: ___

Program	Type	Starting Date	Ending Date	Program Title
200302	PREMIUM	02/24/92	01/29/93	CAMEL B3GF FLEECE SHORTS
201603	COUPON	09/21/92	01/29/93	CAM GM Q4 $2 ON-CTN CPN
201606	PREMIUM	09/21/92	01/29/93	CAM GM Q4 B4GF TACKLE T/SH
201604	PREMIUM	09/21/92	01/29/93	CAM GM Q4 B3GF HUNT'G CAP
201719	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF 1993 PLANNER - 4TH QUARTER
201720	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF CIGARETTE CASE- 4TH QUARTER
201721	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF CLASSIC STYLED INK PEN
201723	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF "PACK MATE" LIGHTER-4TH QTR
201830	VPR	09/21/92	01/29/93	WINSTON-$3.00/CARTON VPR 4TH QTR
202192	VPR	08/24/92	01/29/93	MORE4TH QTR. $.50/PK OPTION VPR
202204	VPR	08/24/92	01/29/93	VANTAGE 4TH QTR $.50/VPR (OPT/SALES)
202265	PREMIUM	08/24/92	01/29/93	NCSA-B4GF GENERIC STATE FAIR
202416	PREMIUM	09/21/92	01/29/93	NASA B3GF HUNTER'S ORANGE CAP
202520	VPR	08/31/92	01/30/93	WINSTON-NMSA CARTON BUYDOWN
202564	PREMIUM	09/28/92	01/29/93	SASA B1CGF LS ATLANTA T-SHIRT (HOOTERS)

PF3 - PREVIOUS SCREEN   PF7 - TOP OF DATA   PF12 - MAIN MENU   PF1 - HELP

2. To view additional pages of promotions, press [ENTER]. To return to the top of the list, press [PF7].

3. If you wish to narrow down this list to one particular type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). A pop-up window will display the following options:

   - C — Coupon Promotions
   - P — BxGxF Promotions
   - R — Premium Promotions
   - V — VPR Promotions
   - ' ' — (blank) All Promotion Types

   Enter the desired promotion type and press [ENTER]. The system will display only promotions for the type specified.

   ❖ *Note:* This step is optional.

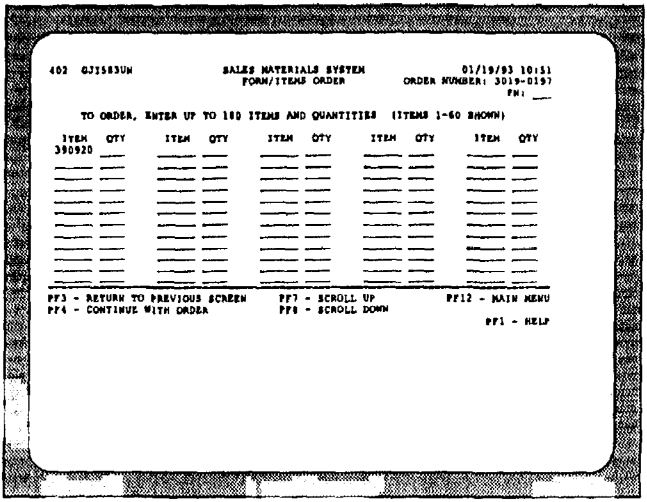
51846 6830

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Select the promotion you wish to order items for and press [ENTER]. Only 1 promotion can be selected.

5. The Form/Items Order screen will be displayed, listing each of the items needed for the promotion:



6. Enter the quantity of each item you wish to order in the **QTY** field. If you do not wish to order any item, leave the **ITEM** and **QTY** fields blank.

   You may also add other items/quantities on this screen. Up to 60 items can be specified on this screen.

7. When you are ready to continue with the order press [PF4]. The Order Review screen will be displayed.

   On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. The system now checks the inventory to determine if all of the items needed are available.

   If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost. If you continue with the order process from this screen, the order will be generated.

9. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder.

```
402  GJ1594U1              SALES MATERIALS SYSTEM             01/19/93 10:56
ORDER FROM: 2126             INVENTORY EXCEPTION        ORDER NUMBER: 3019-0197
   SHIP TO: 2126 / 2126XX
                                       (LINES 1 - 1 OF 1 SHOWN)
        ITEM   DESCRIPTION---------  REQUESTED   AVAILABLE   BACKORDER
      390920   CAMEL BRASS LIGHTER        1            0    **     1 **

ESTIMATED ORDER COST:          65.00    SPECIAL HANDLING COST:
------------------------------------------------------------------------------
PF4  - SHIP NOW (SHIP BACKORDER WHEN AVAIL)  '*'  - DENOTES SUBSTITUTE ITEMS
PF5  - SHIP NOW (CANCEL BACKORDER)           PF6  - SPECIAL HANDLING
PF9  - SUSPEND ORDER (RESERVES INVENTORY)    PF7  - SCROLL UP
PF10 - HOLD UNTIL BACKORDERS ARE FILLED      PF8  - SCROLL DOWN
PF11 - RESTART ORDER                         PF12 - MAIN MENU      PF1 - HELP
```

10. For each item needed, this screen indicates the quantity requested, available, and on backorder. From this screen you can:

   - Press [PF4] to ship the available items and put the missing items on back order. **This will process the order!**
   - Press [PF5] to ship the available items and cancel the items on back order. **This will process the order!**
   - Press [PF6] to request special handling.
   - Press [PF9] to suspend the order. (This will reserve inventory for your order but will not process the order.) When [PF9] is pressed, you will be prompted to enter special Sales Rep instructions (optional).

51846 6832

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Press [PF10] to hold the entire order until backorders are filled. When [PF10] is pressed, you will be prompted to enter special Sales Rep instructions (optional).
- Press [PF11] cancel the entire order.

11. If you need to request special handling, press [PF6].

12. To continue with the order entry process, press [PF4] or [PF5]. The system will prompt you to enter any special Sales Rep instructions. When you are ready to continue, press [ENTER]. Your order will be generated and the following message is displayed:

    YOUR ORDER ####-#### HAS BEEN SUCCESSFULLY PROCESSED.

    At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

13. From here you can:
    - Press [ENTER] to process another order with a different ship-to address
    - Press [PF2] to process another order with the same ship-to address
    - Press [PF12] to return to the SMS Order Entry Menu

Copy Existing Order

Use this option when you wish to copy the items/quantities on an existing order to a new order. This is a fast way to create an order when the items/quantities for the two orders are similar.

1. When this option is selected the system will prompt you to enter the number of the order you wish to copy. The order specified must be a valid SMS order number.
2. When [ENTER] is pressed the Form/Items Order screen is displayed. This screen lists the items/quantities of the "copy from" order.
3. Modify the items/quantities, as desired. You may also add new items.
4. The remainder of this process is the same as for promotion orders. Refer to steps 7–13 in the previous section for additional information.

   After entering commodity numbers for all premiums and advertising by sales representative, check off items ordered on master Workplan Book as orders are placed.

   Confirm orders by voice mail to affected personnel.

The SMS system has been further enhanced to allow for "bulk" ordering of items.

51846 6833

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Bulk Ordering

Functions 422 and 425 are now available to place orders to multiple locations.

- Function 422 is used when ordering identical quantities to multiple locations.
- Function 425 is used when ordering different quantities to multiple locations.

Function 422

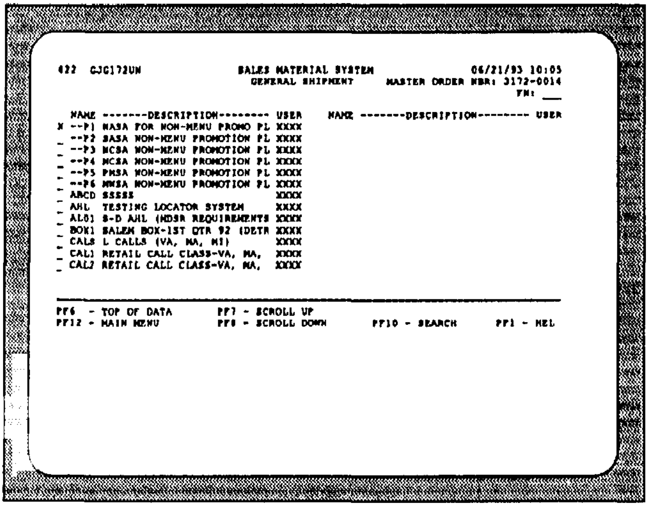
This function contains options for entering general shipment orders into SMS. The general shipment order is a "mass order" that is entered one time and distributed to all ship-to locations on a specified locator list.

This function should be used when the same items and quantities are to be sent to all ship-to locations on the list. If you wish to specify different items/quantities, or omit ship-to locations from the distribution, use function 425 instead.

◆ *Note:* This function is similar to function 402, Order Entry. If you have used that function, this process will be familiar to you.

Procedure

1. Log on to SMS and invoke function 422, Gen Ship — Same Qty Batch Release. The following screen is displayed:



```
422  CJC172UN              SALES MATERIAL SYSTEM              06/21/93 10:05
                            GENERAL SHIPMENT      MASTER ORDER NBR: 3172-0014
                                                                        FN: ___

  NAME -------DESCRIPTION-------- USER    NAME -------DESCRIPTION-------- USER
X --P1 NASA FOR NON-MENU PROMO PL XXXX
_ --P2 SASA NON-MENU PROMOTION PL XXXX
_ --P3 NCSA NON-MENU PROMOTION PL XXXX
_ --P4 NCSA NON-MENU PROMOTION PL XXXX
_ --P5 PMSA NON-MENU PROMOTION PL XXXX
_ --P6 MMSA NON-MENU PROMOTION PL XXXX
_ ARCD SSSSS                      XXXX
_ AHL  TESTING LOCATOR SYSTEM     XXXX
_ AL01 S-D AHL (HDSR REQUIREMENTS XXXX
_ BOX1 SALEM BOX-1ST QTR 92 (DETR XXXX
_ CALS L CALLS (VA, MA, MI)       XXXX
_ CAL1 RETAIL CALL CLASS-VA, MA,  XXXX
_ CAL2 RETAIL CALL CLASS-VA, MA,  XXXX

PF6  - TOP OF DATA       PF7 - SCROLL UP
PF12 - MAIN MENU         PF8 - SCROLL DOWN       PF10 - SEARCH      PF1 - HEL
```

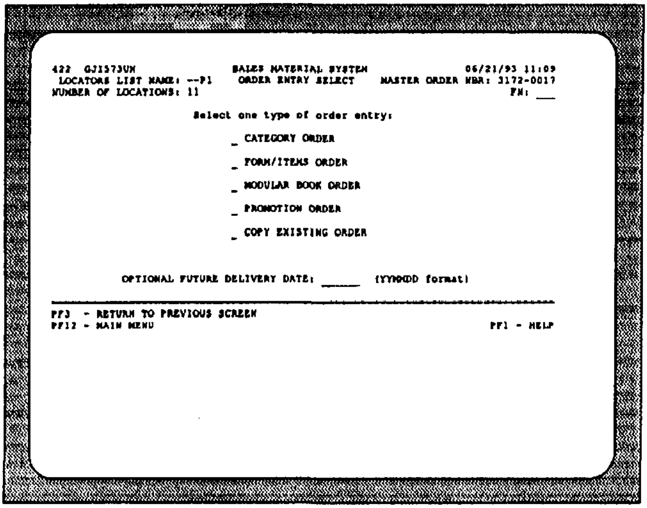
51846 6834

2. Select the locator list for which you wish to generate an order and press [ENTER].

3. The order type selection screen will be displayed:

© *R.J. Reynolds Tobacco Company 1993*

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



4. At the top of the screen, the system indicates the number of orders that will be produced (number of locations on the list selected), and a master order number.

   Enter X beside the type of order you wish to create:

   - Category Order - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
   - Form/Items Order - Use this option when you know the item number(s) you wish to order.
   - Modular Book Order - Currently unavailable (future enhancement).
   - Promotion Order - Use this option to order items for a promotion.
   - Copy Existing Order - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.

5. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the FUTURE DELIVERY DATE field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.
6. Press [ENTER] to continue.

The steps that you must take at this point will vary, depending on the order type selected. The next section contains a summary of this process for using any of the

51846 6835

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

order types. It is followed by detailed instructions for creating a Form/Items order. Refer to the section on function 402 for additional information on the other order types.

Summary of Process

1. At the order type selection screen, select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.

2. Press [ENTER] to continue.

   - *If you have requested a Category order:*
     - The system will prompt you to select a major category. For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
     - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
   - *If you have requested a Form/Items order:*
     - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].
   - *If you have requested a Promotion order:*
     - To view a specific type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
     - Select the promotion for which you wish to order items.
     - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
   - *If you are copying an existing order:*
     - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
     - The system will then list the items/quantities associated with the specified order. Enter/modify items/quantities for the new order you are creating and press [PF4].

3. When the previous step is complete for the type of order selected, the Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.

51846 6836

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. *If all items requested are in inventory, the Order Completion screen is displayed. If all items are not in inventory the Inventory Exceptions screen is displayed.*

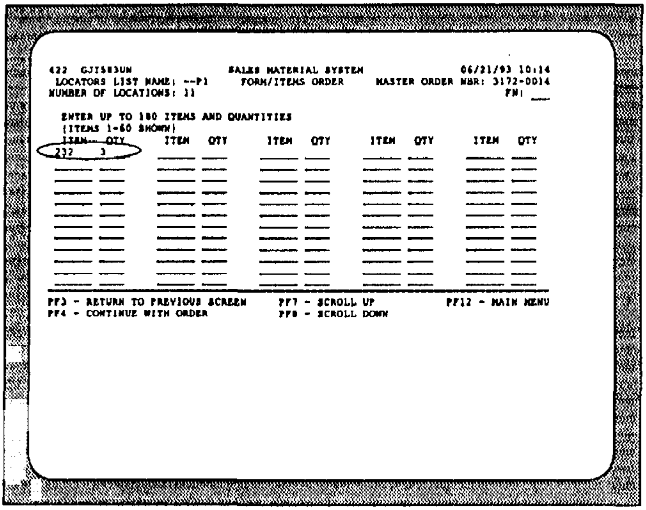
5. From either screen you can request special handling.

6. When you are ready to process the order, press the appropriate PF key ([PF4] from the Order Completion screen; [PF4] or [PF5] from the Inventory Exceptions screen). The order will be generated for all ship-to locations on the locators list.

Form/Items Order

Use this option when you know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.

1. When Form/Items Order is selected, the following screen is displayed:



2. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.

3. Press [PF4] to continue. The following screen is displayed:

51846 6837

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
422  GJC174U2                SALES MATERIAL SYSTEM              06/21/93 12:51
 LOCATORS LIST NAME: --P1   INVENTORY EXCEPTION    MASTER ORDER NBR: 3172-0010
NUMBER OF LOCATIONS: 11
                                      (Available quantity subject to change!)
      (LINES 1 - 1 OF 1 SHOWN)         PER     TOTAL      TOTAL   TOTAL ON
      ITEM   DESCRIPTION---------     ORDER REQUESTED AVAILABLE BACKORDER
        232  ENV. NO. 12 ADD-RJR           3       33          0

ESTIMATED ORDER COST:          787.93    SPECIAL HANDLING COST:
______________________________________________________________________________
PF3 - RETURN TO PREVIOUS SCREEN   PF7  - SCROLL UP
PF4 - COMPLETE ORDER              PF8  - SCROLL DOWN
PF6 - SPECIAL HANDLING            PF12 - MAIN MENU (ABORT ORDER)    PF1 - HELP
```

4. This screen lists the items requested, the number of each item per order, and the total number requested for all ship-to locations.

   WARNING: This is the point of no return! If you go forward from here, an order will be generated!

5. *From this screen you can:*

   - Press [PF4] to complete the order
   - Press [PF6] to request special handling of the order
   - Press [PF12] to cancel the order

6. If you wish to complete the order, press [PF4]. You will be prompted to enter special instructions. This entry is optional. If you do enter special instructions, they will apply to all ship-to locations on the locator list.

7. When special handling instructions have been entered or skipped, press [ENTER] to continue. The order is generated and the following confirmation screen is displayed:

51846 6838

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
422  GJG174U2                 SALES MATERIAL SYSTEM               06/21/93 13:11
                               GENERAL SHIPMENT      MASTER ORDER NBR: 3172-0018
                                                                           FN: __

          LOCATION LIST NAME: --P1

          YOUR GENERAL SHIPMENT ORDERS WILL BE PROCESSED TONIGHT


          ESTIMATED ORDER COST :          787.93

          SPECIAL HANDLING COST:



PRESS ENTER TO RETURN TO THE MAIN MENU
```

8. This screen confirms that your order will be processed. To return to the SMS Order Entry Menu, press [ENTER].

Function 425

This function contains options for entering general shipment orders into SMS. This function is similar to 422, which is also for entering general shipment orders. However, function 425 allows you to specify different items/quantities, for the various ship-to locations on the locator list. You may also omit ship-to locations from the distribution.

> *Note:* If you are entering the same items/quantities for all ship-to locations in a locators list, use function 422 instead as it will be faster.

Procedure

1. Log on to SMS and invoke function 425, Gen Ship — Different Quantities. The following screen is displayed:

51846 6839

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
422  CJC172UN                    SALES MATERIAL SYSTEM              06/21/93 10:05
                                  GENERAL SHIPMENT     MASTER ORDER NBR: 3172-0014
                                                                            FN: ___

  NAME -------DESCRIPTION-------- USER    NAME -------DESCRIPTION-------- USER
X --P1 NASA FOR NON-MENU PROMO PL XXXX
_ --P2 SASA NON-MENU PROMOTION PL XXXX
_ --P3 NCSA NON-MENU PROMOTION PL XXXX
_ --P4 NCSA NON-MENU PROMOTION PL XXXX
_ --P5 PMSA NON-MENU PROMOTION PL XXXX
_ --P6 NNSA NON-MENU PROMOTION PL XXXX
_ ABCD $$$$$                      XXXX
_ AHL  TESTING LOCATOR SYSTEM     XXXX
_ AL01 S-D AHL (MDSR REQUIREMENTS XXXX
_ BOX1 SALEM BOX-1ST QTR 92 (DETR XXXX
_ CALS L CALLS (VA, MA, MI)       XXXX
_ CAL1 RETAIL CALL CLASS-VA, MA,  XXXX
_ CAL2 RETAIL CALL CLASS-VA, MA,  XXXX
_
______________________________________________________________________________
PF6  - TOP OF DATA        PF7 - SCROLL UP
PF12 - MAIN MENU          PF8 - SCROLL DOWN       PF10 - SEARCH      PF1 - HEL
```

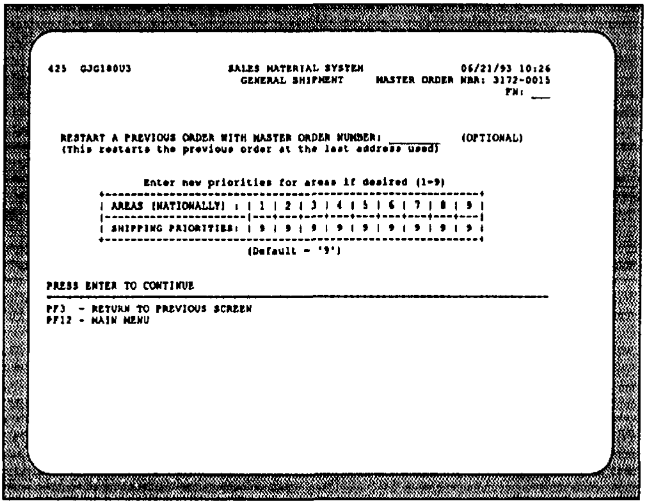
2. Select the locator list for which you wish to generate an order and press [ENTER].

3. The following screen is displayed:

51846 6840

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



```
425  GJG180U3              SALES MATERIAL SYSTEM              06/21/93 10:26
                            GENERAL SHIPMENT      MASTER ORDER NBR: 3172-0015
                                                                        FN: ___

  RESTART A PREVIOUS ORDER WITH MASTER ORDER NUMBER: ________    (OPTIONAL)
  (This restarts the previous order at the last address used)

              Enter new priorities for areas if desired (1-9)
       +------------------------------------------------------+
       | AREAS (NATIONALLY) : | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
       |----------------------|---+---+---+---+---+---+---+---+---|
       | SHIPPING PRIORITIES: | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 |
       +------------------------------------------------------+
                           (Default - '9')

PRESS ENTER TO CONTINUE
_____________________________________________________________________________
PF3  - RETURN TO PREVIOUS SCREEN
PF12 - MAIN MENU
```

4. Most of the time, you will press [ENTER] to bypass this screen. However, there are 2 instances in which it is useful.

   - If you had previously started the order entry process but were interrupted before completing the order, you can pick up where you left off. Simply enter the **MASTER ORDER NUMBER** in the space provided and press [ENTER]. The system will automatically begin the order entry process for the next location in the locator list.

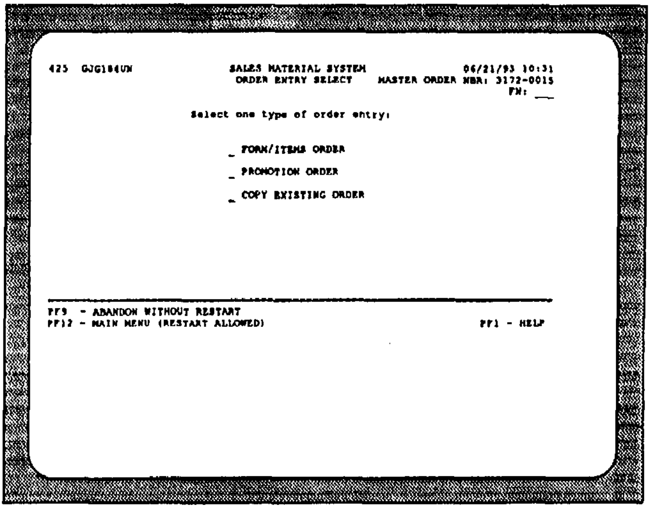
   - This screen may also be used to specify one or more high priority ship-to areas. This is useful if inventory is low and it is critical that an area receive its shipment, or when the transit time to one area is longer than the others.

     To specify a priority, enter a number between 1 and 9, with 9 being lowest priority and 1 being highest.

5. When [ENTER] is pressed, the order type selection screen is displayed:

© R.J. Reynolds Tobacco Company 1993

51846 6841



6. Enter X beside the type of order you wish to create:
   - Form/Items Order - Use this option when you know the item number(s) you wish to order.
   - Promotion Order - Use this option to order items for a promotion.
   - Copy Existing Order - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.
7. When an order type has been selected, press [ENTER] to continue.

The steps that you must take at this point will vary, depending on the order type selected. The next section contains detailed instructions for creating a Form/Items order. Refer to the section on function 402 for additional information on the other order type.

Note: Throughout this process, the following exit options are available:

- Press [PF9] to exit and abandon the order (you will not be able to restart the order at a later point in time).
- Press [F12] to exit and save the order (you will be able to restart the order at a later point in time).

51846 6842

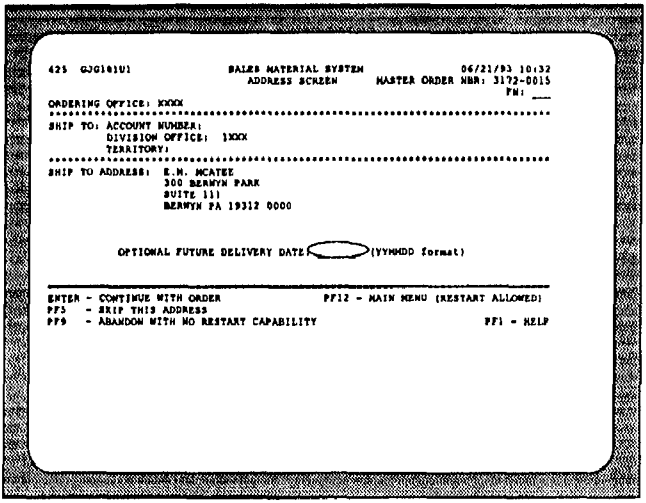
 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Form/Items Order

Use this option when you know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.

1. When Form/Items Order is selected, the system displays ship-to information for the first location in the locators list:



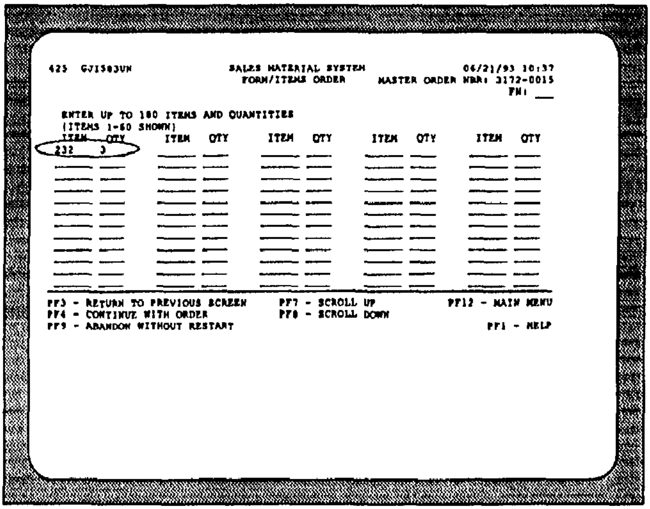
```
425  GJG101U1              SALES MATERIAL SYSTEM             06/21/93 10:32
                             ADDRESS SCREEN     MASTER ORDER NBR: 3172-0015
                                                                   FN: ___
ORDERING OFFICE: XXXX
**************************************************************************
SHIP TO: ACCOUNT NUMBER:
         DIVISION OFFICE:  1XXX
         TERRITORY:
**************************************************************************
SHIP TO ADDRESS:  E.M. MCATEE
                  300 BERWYN PARK
                  SUITE 111
                  BERWYN PA 19312 0000

         OPTIONAL FUTURE DELIVERY DATE:        (YYMMDD format)

ENTER - CONTINUE WITH ORDER              PF12 - MAIN MENU (RESTART ALLOWED)
PF3   - SKIP THIS ADDRESS
PF9   - ABANDON WITH NO RESTART CAPABILITY                        PF1 - HELP
```

2. If you *do not* wish to enter an order for this location, press [PF3] to skip this address and proceed to the next.

   If you *do* wish to enter an order for this location, you may specify a future delivery date if one is desired. To do so, enter the desired delivery date in the **FUTURE DELIVERY DATE** field. The date specified cannot be more than 210 days into the future, and must be entered in *YYMMDD* format.

3. When you are ready to continue, press [ENTER]. The system will allow you to specify the items/quantities to be ordered for this location:

51846 6843



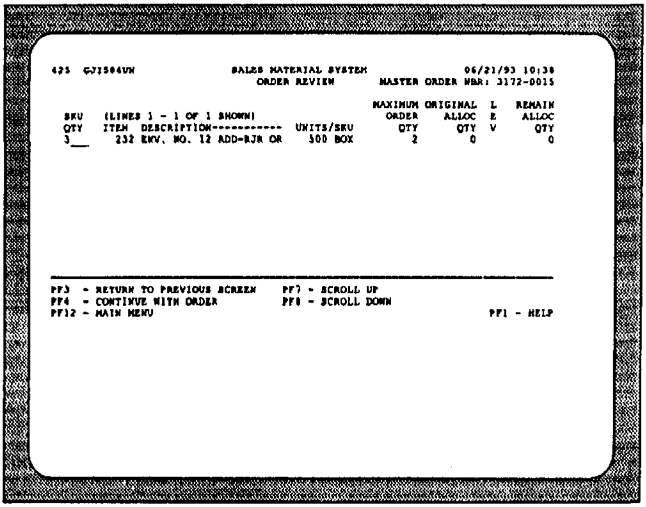
4. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.

5. Press [PF4] to continue. The following screen is displayed:

51846 6844

© R.J. Reynolds Tobacco Company 1993

ORDERING PREMIUMS



```
425  GJ1504UH              SALES MATERIAL SYSTEM              06/21/93 10:38
                                ORDER REVIEW       MASTER ORDER NBR: 3172-0015

                                                   MAXIMUM ORIGINAL  L   REMAIN
 SKU   (LINES 1 - 1 OF 1 SHOWN)                      ORDER    ALLOC  E    ALLOC
 QTY   ITEM  DESCRIPTION-----------  UNITS/SKU        QTY      QTY  V      QTY
 3___    232 ENV. NO. 12 ADD-RJR OR    500 BOX          2        0           0

PF3  - RETURN TO PREVIOUS SCREEN    PF7 - SCROLL UP
PF4  - CONTINUE WITH ORDER          PF8 - SCROLL DOWN
PF12 - MAIN MENU                                                  PF1 - HELP
```

6. This screen lists the items/quantities requested.

   WARNING: This is the point of no return! If you go forward from here, an order will be generated for this ship-to location!

7. From this screen you can:

   - Press [PF4] to complete the order
   - Press [PF12] to cancel the order

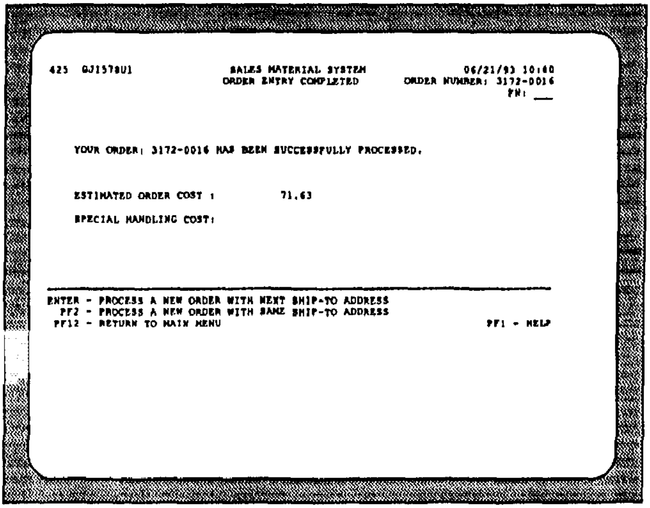
8. If you wish to complete the order, press [PF4]. You will be prompted to enter special handling instructions for this ship-to location. This entry is optional.

9. When special handling instructions have been entered or skipped, press [ENTER] to continue. The order is generated and the following confirmation screen is displayed:

51846 6845

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



10. This screen confirms that your order will be processed. From this screen you can:
    - Process a new order with the *next* ship-to address in the locator list
    - Process a new order for the *same* ship-to address
    - Return to the SMS Order Entry Menu
11. When either of the "Process new order" options are selected, the system returns to the ship-to screen and begins this process over again.
12. Repeat this process as many times as necessary to generate orders for other ship-to locations in the locator list.

These two functions will greatly expedite the processing of orders for the Operations Unit.

To properly use the bulk-order functions, the PRC must customize lists of locations which can be pulled to send orders to. Suggested and commonly used lists include:

- Each Division's sales reps ship-to locations
- Each Division's sales reps home addresses
- Each Region's Direct Account locations
- Each Region's Division Office locations

51846 6846

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

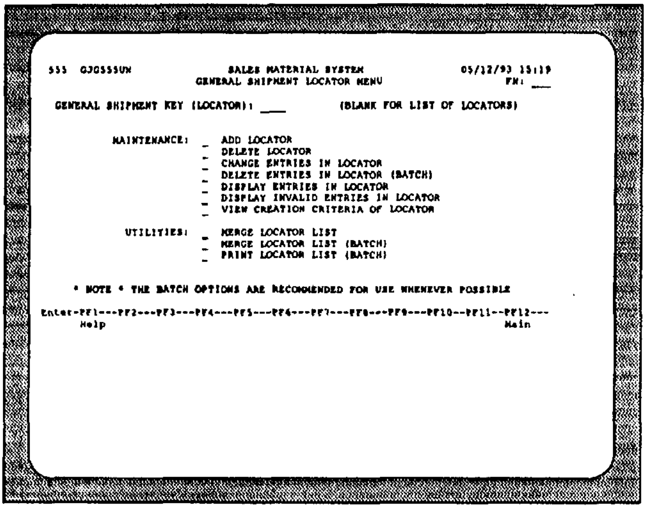
Following are instructions relative to setting up these customized shipment lists.

Function 555

This function is used to build a locator list for general shipment ordering.

Procedure

1. Log on to SMS and invoke function 555, Define Locator List. The following screen will be displayed:



```
555  GJGSSSUN            SALES MATERIAL SYSTEM            05/12/93 15:19
                     GENERAL SHIPMENT LOCATOR MENU                FN: ___

GENERAL SHIPMENT KEY (LOCATOR): ____        (BLANK FOR LIST OF LOCATORS)

       MAINTENANCE:  _  ADD LOCATOR
                     _  DELETE LOCATOR
                     _  CHANGE ENTRIES IN LOCATOR
                     _  DELETE ENTRIES IN LOCATOR (BATCH)
                     _  DISPLAY ENTRIES IN LOCATOR
                     _  DISPLAY INVALID ENTRIES IN LOCATOR
                     _  VIEW CREATION CRITERIA OF LOCATOR

         UTILITIES:  _  MERGE LOCATOR LIST
                     _  MERGE LOCATOR LIST (BATCH)
                     _  PRINT LOCATOR LIST (BATCH)

   * NOTE * THE BATCH OPTIONS ARE RECOMMENDED FOR USE WHENEVER POSSIBLE

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help                                                              Main
```

2. From this screen you can:
   - add a locator list
   - view, change, or delete a locator list
   - view criteria used to create a locator list
   - view invalid entries in a locator list
   - merge or print a locator list

   The delete entries and merge/print functions can be performed online or in batch. Batch options are recommended when there are many entries in the list.

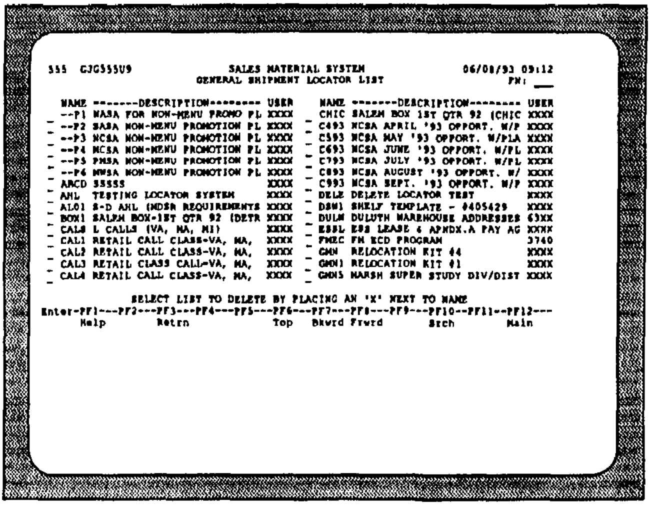
3. To use this function, enter the 4-character locator code for the list you wish to add or maintain and select the desired maintenance option.

   If you do not know the locator ID, select the maintenance function you wish to use press [ENTER]. A locator list selection screen is displayed:

© R.J. Reynolds Tobacco Company 1993

51846 6847

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



```
555  CJG555U9                    SALES MATERIAL SYSTEM                    06/08/93 09:12
                               GENERAL SHIPMENT LOCATOR LIST                      PN: ___

  NAME -------DESCRIPTION--------- USER    NAME -------DESCRIPTION--------- USER
  --P1 NASA FOR NON-MENU PROMO PL XXXX  _ CHIC SALEM BOX 1ST QTR 92 (CHIC XXXX
_ --P2 SASA NON-MENU PROMOTION PL XXXX  _ C493 NCSA APRIL '93 OPPORT. W/P XXXX
_ --P3 NCSA NON-MENU PROMOTION PL XXXX  _ C593 NCSA MAY '93 OPPORT. W/PLA XXXX
_ --P4 NCSA NON-MENU PROMOTION PL XXXX  _ C693 NCSA JUNE '93 OPPORT. W/PL XXXX
_ --P5 PMSA NON-MENU PROMOTION PL XXXX  _ C793 NCSA JULY '93 OPPORT. W/PL XXXX
_ --P6 MWSA NON-MENU PROMOTION PL XXXX  _ C893 NCSA AUGUST '93 OPPORT. W/ XXXX
_ ARCD 55555                      XXXX  _ C993 NCSA SEPT. '93 OPPORT. W/P XXXX
_ AHL  TESTING LOCATOR SYSTEM     XXXX  _ DELE DELETE LOCATOR TEST        XXXX
_ AL01 S-D AHL (NDSR REQUIREMENTS XXXX  _ DSW1 SHELF TEMPLATE - #405429   XXXX
_ BOX1 SALEM BOX-1ST QTR 92 (DETR XXXX  _ DULM DULUTH WAREHOUSE ADDRESSES 63XX
_ CAL8 L CALLS (VA, MA, MI)       XXXX  _ E88L E88 LEASE & APNDX.A PAY AG XXXX
_ CAL1 RETAIL CALL CLASS-VA, MA,  XXXX  _ FMEC FM ECD PROGRAM             3740
_ CAL2 RETAIL CALL CLASS-VA, MA,  XXXX  _ GMN  RELOCATION KIT #4          XXXX
_ CAL3 RETAIL CLASS CALL-VA, MA,  XXXX  _ GMN1 RELOCATION KIT #1          XXXX
_ CAL4 RETAIL CALL CLASS-VA, MA,  XXXX  _ GMN5 MARSH SUPER STUDY DIV/DIST XXXX
_                                       _
                  SELECT LIST TO DELETE BY PLACING AN 'X' NEXT TO NAME
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help        Retrn             Top   Bkwrd Frwrd       Srch        Main
```

4. Select the desired locator list and press [ENTER].

5. The remainder of this chapter discusses each option in more detail.

51846 6848

© R.J. Reynolds Tobacco Company 1993

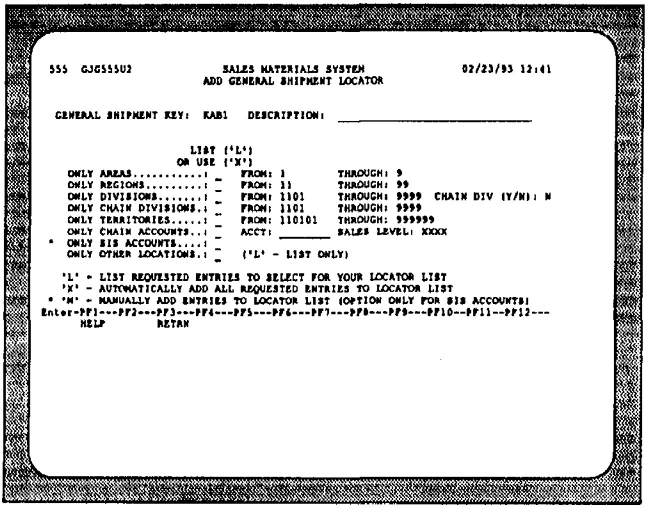
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Add Locator

This option is used to add a new general shipment list.

1. Enter a unique 4-character code to identify your list in the **LOCATOR** field. Enter **X** beside the **ADD** option and press [ENTER].

2. The following screen will be displayed:



3. This screen contains several options for specifying the accounts to be included in the locator list. Accounts can be specified by:

- Area
- Region
- Division
- Chain Division
- Territory
- Chain account
- SIS accounts
- Other locations

51846 6849

4. For each of the first 6 options, a range can be specified to narrow down the list.

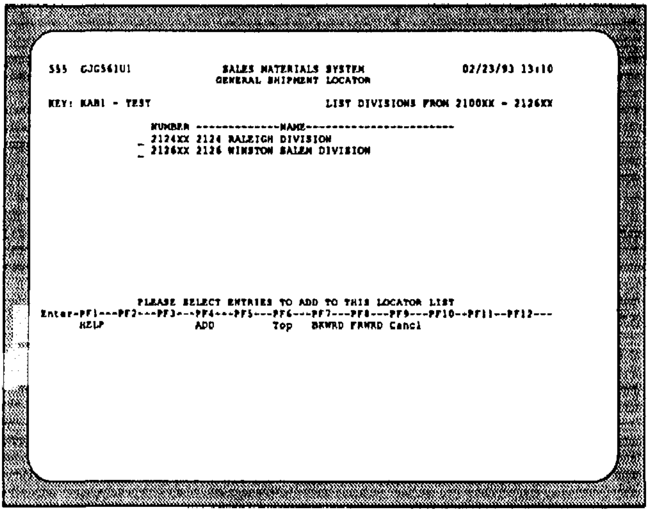
5. In addition, each option can be marked with an X or L. When the option is marked with an L, the system will list those Areas, Regions, Divisions, etc. that fall into the range specified (or all if no range is specified). You can then select the ones you wish to include in the locator.

   If the option is marked with an X, the system automatically includes all Areas, Regions, etc., in the range (if any) in the locator.

   The SIS Accounts option can also be marked with an M. When this method is used, you can manually enter the desired accounts.

6. To create a locator, enter a description of your new list in the **DESCRIPTION** field, then select the desired option. Remember to use an L if you wish to view a list of accounts. You may also specify a range.

   For demonstration purposes, we will mark the Division option with an L and enter a range of **2100** to **2126**. When this method is used, a screen similar to the following is displayed:



7. If we had selected an area or Region instead, this screen would list Areas/Regions that match any criteria specified.

8. If this screen is full, press [FRWRD]/[BKWRD] to scroll through the list. Press

51846 6850

© R.J. Reynolds Tobacco Company 1993

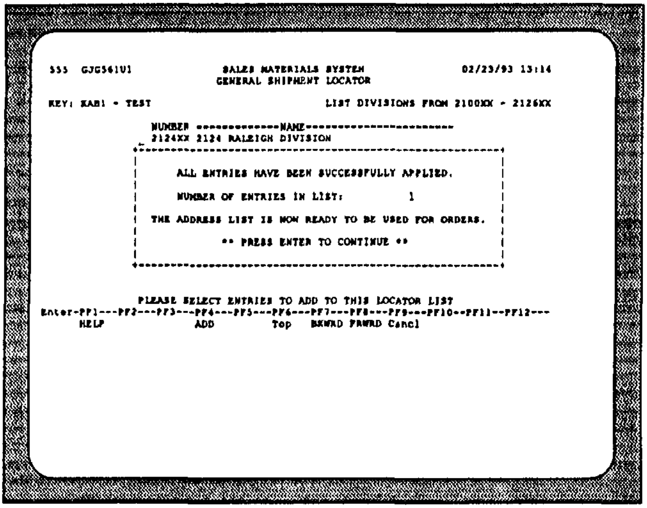
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

[TOP] to return to the top of the list.

9. Enter X to select the entries you wish to add to the locator list and press [ADD].

   (If you do not wish to create the locator list, press [CANCL] to exit.)

10. The following window will be displayed:



11. You can now use the locator you have created for orders. Press [ENTER] to return to the Locator Menu screen.

51846 6851

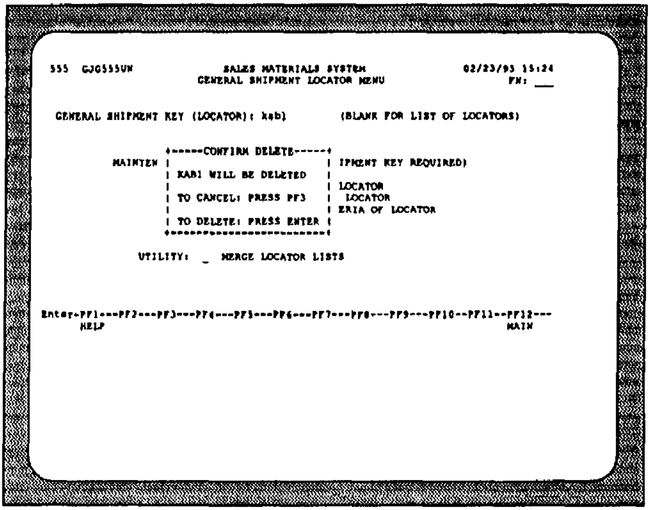
Delete Locator

This option is used to delete an existing locator list.

1. Enter the locator code for the list you wish to delete. Enter X beside the DELETE option and press [ENTER].

   - *Note:* If you do not know the locator code, mark the DELETE option and press [ENTER] to select the locator list.

2. The following window will be displayed:



3. If you wish to delete the list, press [ENTER]; otherwise press PF3 to cancel.

4. If you have pressed [ENTER] to delete the list, the message, Deleted Successfully, will be displayed. Press [ENTER] to return to the General Shipment Locator Menu.

51846 6852

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Change Locator

This option is used to change an existing locator list.

1. Enter the locator code for the list you wish to change. Enter X beside the **CHANGE** option and press [ENTER].

   ◆ *Note:* If you do not know the locator code, mark the **CHANGE** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:

```
*** PLEASE PRESS PF11 TO UPDATE LIST AND RETURN TO MENU ***
555  GJG555U5              SALES MATERIALS SYSTEM                02/23/93 14:22
                   GENERAL SHIPMENT LOCATOR LIST UPDATE
KEY    KAB1 TEST
SETUP XXXX 02/23/93 SHARON S KORCZYK
      REGULAR CREATION BY ADDING
ACTION              SIS                                              INVALID
(A,D)  ARDT  RTE CC  ACCOUNT  ----------------NAME--------------------  DATA
       2126XX                 2126 WINSTON SALEM DIVISION
  _               _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
  _    ______     _______
   CAUTION - INVALID DATA (SHOWN IN RED) SHOULD BE CORRECTED BEFORE USING LIST
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  Chain Area  Reg   Div   Terr  BKWRD FRWRD Other SIS   Exit
```

3. If this screen is full, press [FRWRD]/[BKWRD] to scroll through the list.

4. From this screen you can:

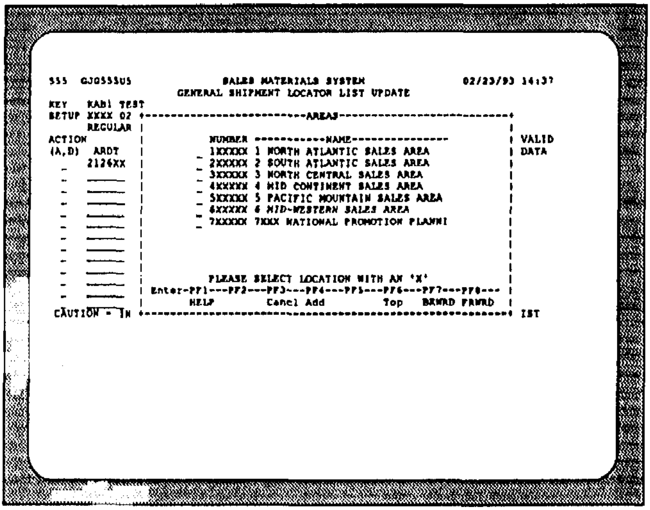
   - Enter **A** in the ACTION column to add a new line item (Area, Region, Division, Territory, or SIS account). You must also specify the item to be added.
   - Enter **D** in the ACTION column to delete an existing line item.

© R.J. Reynolds Tobacco Company 1993

51846 6853

5. You may also add to this locator list by using the PF keys at the bottom of the screen. For example, you can add accounts for a chain, as well as Areas, Regions, Divisions, Territories, locations, or SIS accounts.

6. When the Area, Region, Division or Territory PF keys are pressed, the system will prompt you for a range, and then display a selection list (of Areas, Regions, Divisions, or Territories) based on your response:



7. Select those you wish to add to the locator list and press [ADD], or press [CANCL] to cancel.

51846 6854

© R.J. Reynolds Tobacco Company 1993

8. When the chain PF key is pressed, the system will prompt you for a **CHAIN NAME** and **SALES LEVEL**, and then display a selection list of chains based on your responses:

```
555  5555-03                 SALES MATERIALS SYSTEM              02/23/93 14:40
                               CHAIN MASTER LOOKUP

  -CHAIN ID- ---------NAME--------- -------ADDRESS------- ----CITY------- ST  DIV
  0502 00 00 FOOD LION              P. O. BOX 1330        SALISBURY       NC 2142
_ 2732 00 00 FOODLAND               MIDDLETOWN MALL       FAIRMONT        WV 3132
_ 5245 00 00 FOODLAND               407 W HURON           MISSOURI VALLEY IA 6530
_ 5555 00 00 FOODLAND               407 W. HURON          MISSOURI VALLEY IA 6530
_ 5061 00 00 FOODLAND OF CHAS. IN 3443 A RIVERS AVE.      CHARLESTON      SC 2234
_ 1915 00 00 FOODLAND MARKETS       741 EAST BARSTOW      FRESNO          CA 5422
_ 2147 00 00 FOODLAND MARKETS       ATTN. JACK MCKENNA    HUNTINGTON      WV 3136
_ 1836 00 00 FOODLAND, INC.         9201 JENSON           HOUSTON         TX 4529
_ 1349 00 00 FOODLAND SUPER MKT     3536 HARDING AVE.     HONOLULU        HI 5434
_ 2278 00 00 FOODLAND STORES        ATTN:  STEVE MEADOWS FAYETTEVILLE     WV 3136
_ 4097 00 00 FOODLINER IGA          1014 RICHLANDS HWY    JACKSONVILLE    NC 2134
_

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP                                Top   BKWRD FRWRD
```

9. Select the chain for which you wish to view accounts and press [ENTER]. The following screen will be displayed:

51846 6855

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
555  #555-03              SALES MATERIALS SYSTEM               02/23/93 14:40
                           CHAIN MASTER LOOKUP
               +-------------------------ACCOUNTS--------------------------+
  -CHAIN ID-   |                                                            |
X 0502 00 00   | ACCOUNT: 0502-0000 FOOD LION             SALES LVL: XXXXXX |
_ 2732 00 00   |                                              SIS           |
_ 5245 00 00   |            AADT  --------NAME---------- ACCOUNT            |
_ 5555 00 00   |         _ 132721 FOOD LION #585          796814            |
_ 5061 00 00   |         _ 132721 FOOD LION #879          355506            |
_ 1915 00 00   |         _ 132721 FOOD LION #975          391937            |
_ 2147 00 00   |         _ 132721 FOOD LION #1206         477658            |
_ 1036 00 00   |         _ 132721 FOOD LION #960          439218            |
_ 1349 00 00   |         _ 132721 FOOD LION #488          541187            |
_ 2278 00 00   |         _ 212401 FOOD LION #54           800225            |
_ 4097 00 00   |         _ 212401 FOOD LION #757          306087            |
               |         _ 212401 FOOD LION #586          735171            |
               |         _ 212401 FOOD LION #76           799632            |
               |                                                            |
               |          PLEASE SELECT ACCOUNT WITH AN 'X'                 |
               |                                                            |
               | Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9--|
Enter-PF1---PF |       HELP        Cancl ADD                                |
     HELP      +------------------------------------------------------------+
```

10. This screen displays the accounts associated with the chain-ID selected. Enter X beside the accounts you wish to add to your locator list, then press [ADD] (or press [CANCL] to cancel).

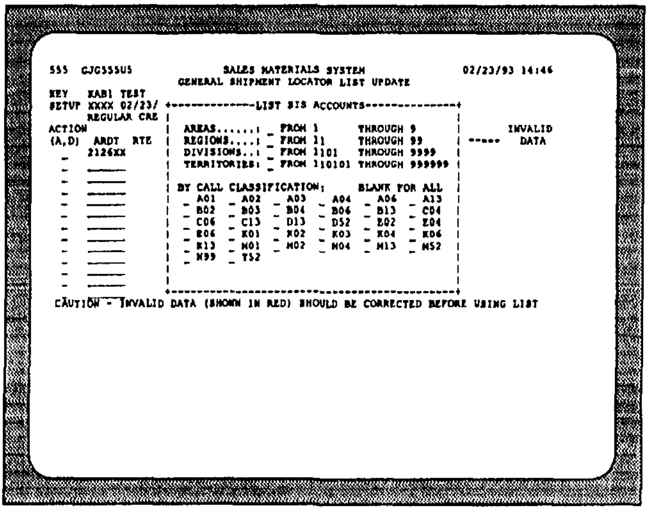
11. When you are ready to exit, press [RETRN].

51846 6856

 © R.J. Reynolds Tobacco Company 1993

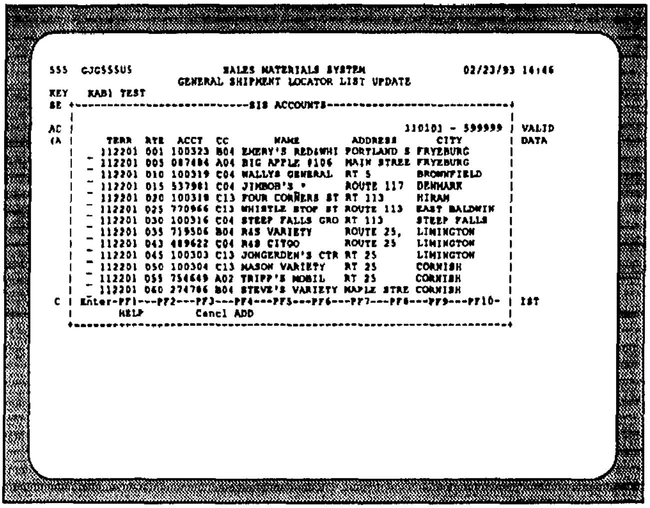
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

12. When the SIS PF key is pressed, the system will prompt you to specify criteria for the accounts you wish to add:



13. Enter criteria for the SIS account list you wish to view and press [ENTER]. A screen similar to the following will be displayed:

© R.J. Reynolds Tobacco Company 1993



```
SSS  CJCSSSUS            SALES MATERIALS SYSTEM              02/23/93 14:46
                   GENERAL SHIPMENT LOCATOR LIST UPDATE
KEY   KABI TEST
SE +---------------------------SIS ACCOUNTS---------------------------+
   |                                                                   |
AC |                                                 110101 - 599999 | VALID
(A |     TERR  RTE  ACCT   CC        NAME            ADDRESS      CITY     | DATA
   |    112201 001 100323 B04 EMERY'S RED&WHI PORTLAND S FRYEBURG    |
   |  _ 112201 005 087484 A04 BIG APPLE #106  MAIN STREE FRYEBURG    |
   |  _ 112201 010 100319 C04 WALLYS GENERAL  RT 5       BROWNFIELD  |
   |  _ 112201 015 537981 C04 JIMBOB'S *      ROUTE 117  DENMARK     |
   |  _ 112201 020 100318 C13 FOUR CORNERS ST RT 113     HIRAM       |
   |  _ 112201 025 770966 C13 WHISTLE STOP ST ROUTE 113  EAST BALDWIN |
   |  _ 112201 030 100316 C04 STEEP FALLS GRO RT 113     STEEP FALLS |
   |  _ 112201 035 719506 B04 R&S VARIETY     ROUTE 25,  LIMINGTON   |
   |  _ 112201 043 489622 C04 R&B CITGO       ROUTE 25   LIMINGTON   |
   |  _ 112201 045 100303 C13 JONGERDEN'S CTR RT 25      LIMINGTON   |
   |  _ 112201 050 100304 C13 MASON VARIETY   RT 25      CORNISH     |
   |  _ 112201 055 754649 A02 TRIPP'S MOBIL   RT 25      CORNISH     |
   |  _ 112201 060 274786 B04 STEVE'S VARIETY MAPLE STRE CORNISH     |
C  | Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10- | IST
   |       HELP         Cancl ADD                                     |
   +-------------------------------------------------------------------+
```

14. This screen lists accounts associated with the parameters specified on the previous screen. Enter X beside the accounts you wish to add to your locator list, then press [ADD] (or press [CANCL] to cancel).

15. When you are ready to exit, press [RETRN].

16. At the Locator List Update screen, press [EXIT] to return to the General Shipment Locator Menu.

51846 6858

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

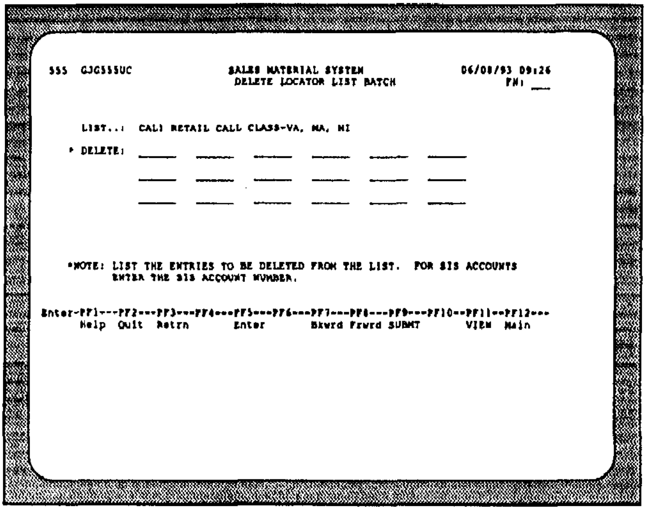
Delete Entries in Locator (Batch)

This option is used to remove one or more entries from a locator list.

1. Enter the locator code for the list you wish to delete entries from and enter an X beside the **DELETE ENTRIES** option; press [ENTER].

   ◆ *Note:* If you do not know the locator code, mark the **DELETE ENTRIES** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:



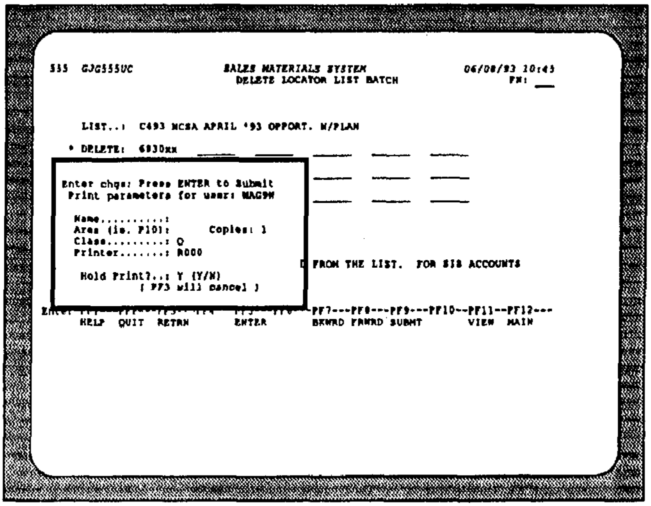
3. Enter the entries to be deleted from the list. For SIS accounts, enter the SIS account number.

4. When all entries to be removed from the list have been entered, press [SUBMIT]. The following pop-up window is displayed:

51846 6859

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



5. This window indicates where the report will be printed and whose name will appear on the cover sheet.

   Review the **NAME, AREA, PRINTER** and **COPIES** indicated. If you wish to change them, you may do so. If these fields do not contain entries, they must be specified.

   Also, make sure the **HOLD PRINT** option is set to **N**. Otherwise, the report will only be available online.

6. Press [ENTER] to submit the report request, or [PF3] to cancel.

51846 6890

© R.J. Reynolds Tobacco Company 1993

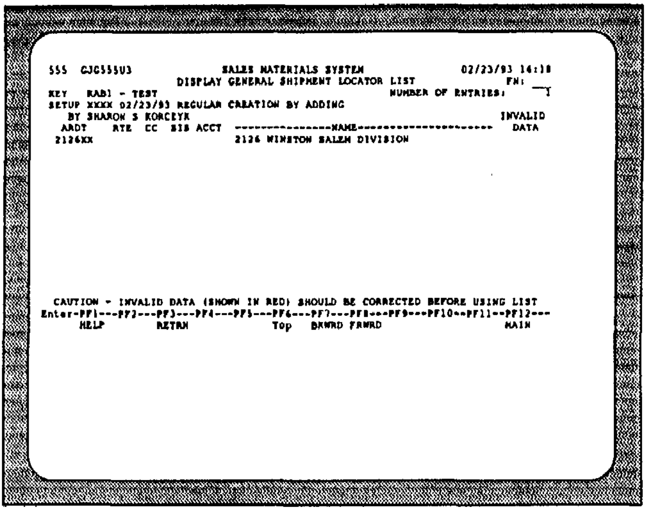
Display Locator

This option is used to view an existing locator list.

1. Enter the locator code for the list you wish to view. Enter X beside the **DISPLAY** option and press [ENTER].

   ◆ *Note:* If you do not know the locator code, mark the **DISPLAY** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:



3. If this screen is full, press [FRWRD]/[BKWRD] to scroll through the list. Press [TOP] to return to the top of the list.

4. When you are ready to exit, press [RETRN].

51846 6861

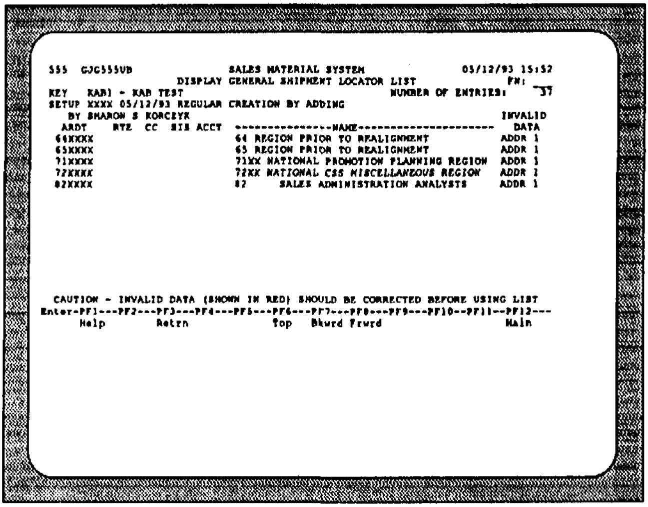
Display Invalid Entries in Locator

This option is used to view invalid entries in a locator list. Invalid entries can occur when an invalid address exists in the master list.

1. Enter the locator code for which you wish to view invalid entries. Enter X beside the **DISPLAY INVALID ENTRIES** option and press [ENTER].

   ◆ *Note:* If you do not know the locator code, mark the **DISPLAY INVALID ENTRIES** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:



```
SSS  GJCSSSVB              SALES MATERIAL SYSTEM              05/12/93 15:52
                 DISPLAY GENERAL SHIPMENT LOCATOR LIST              FN:
KEY   KAB1 - KAB TEST                               NUMBER OF ENTRIES:    37
SETUP XXXX 05/12/93 REGULAR CREATION BY ADDING
  BY SHARON S KORCZYK                                                INVALID
 ARDT    RTE  CC  SIS ACCT  ---------------NAME---------------------    DATA
 64XXXX                     64 REGION PRIOR TO REALIGNMENT             ADDR 1
 65XXXX                     65 REGION PRIOR TO REALIGNMENT             ADDR 1
 71XXXX                     71XX NATIONAL PROMOTION PLANNING REGION    ADDR 1
 72XXXX                     72XX NATIONAL CSS MISCELLANEOUS REGION     ADDR 1
 82XXXX                     82      SALES ADMINISTRATION ANALYSTS      ADDR 1

  CAUTION - INVALID DATA (SHOWN IN RED) SHOULD BE CORRECTED BEFORE USING LIST
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Help      Retrn             Top   Bkwrd Frwrd                     Main
```

3. Invalid information is displayed in the right-most column. This information is red on color terminals.

4. This function is only used to *display* invalid information. To remove invalid information, you must use the **PRINT LOCATOR LIST** function.

5. When you are ready to exit, press [RETRN]. Refer to the section on the **PRINT LOCATOR LIST** function for instructions on deleting invalid information.

51846 6862

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

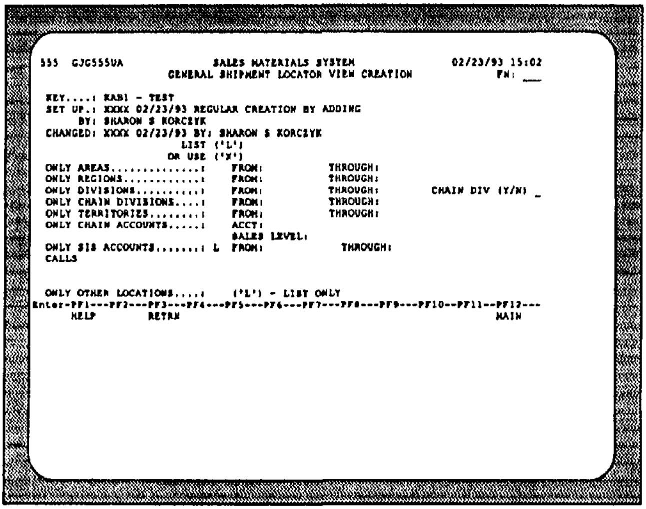
View Creation Criteria of Locator

This option is used to view the criteria used to build a locator list.

1. Enter the locator code for which you wish to view creation criteria. Enter X beside the **VIEW** option and press [ENTER].

   ◆ *Note:* If you do not know the locator code, mark the **VIEW** option and press [ENTER] to select the locator list.

2. A screen similar to the following will be displayed:



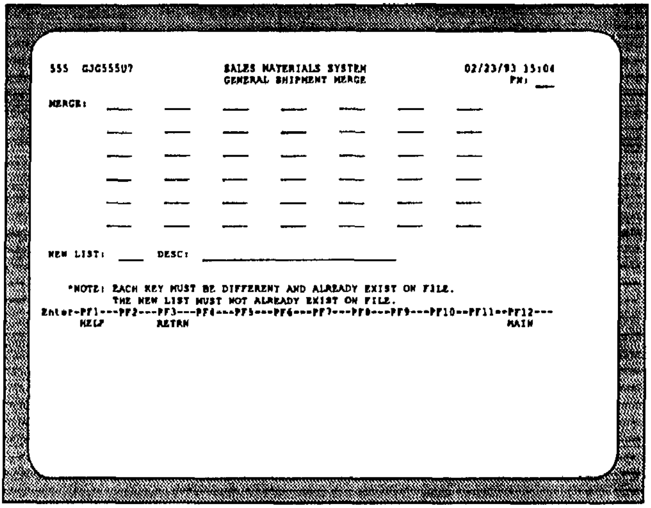
3. When you are ready to exit, press [RETRN].

51846 6863

Merge Locator Lists

This option is used to merge one or more lists into a new list.

1. Enter X beside the **MERGE** option and press [ENTER].
2. A screen similar to the following will be displayed:



3. Enter the 4-character key of each list to be merged. The keys specified must be valid.
4. In the **NEW LIST** field enter a unique, 4-character key for the new list that will be created when the lists are merged. Enter a description for the list in the **DESC** field.
5. When you are finished, press [ENTER]. The system will merge your lists and display a confirmation message. (This process may take a few moments to complete.)
6. Press [ENTER] to return to the General Shipment Locator Menu.

51846 6864

© R.J. Reynolds Tobacco Company 1993

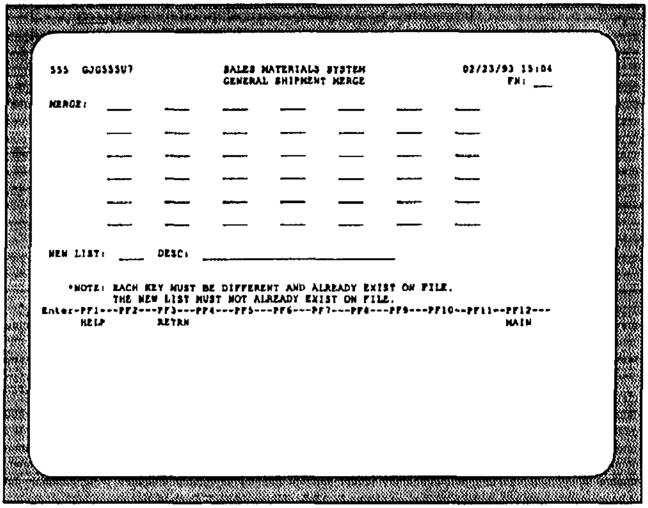
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Merge Locator Lists (Batch)

This option is used to merge one or more lists into a new list. This function is similar to the other merge option. With the batch option, however, the lists are not combined until the next nightly batch merge job runs.

1. Enter X beside the **MERGE (BATCH)** option and press [ENTER].

2. A screen similar to the following will be displayed:



3. Enter the 4-character key of each list to be merged. The keys specified must be valid.

4. In the **NEW LIST** field enter a unique, 4-character key for the new list that will be created when the lists are merged. Enter a description for the list in the **DESC** field.

5. When you are finished, press [ENTER]. When the next nightly batch merge job runs, the lists will be combined.

6. Press [ENTER] to return to the General Shipment Locator Menu.

51846 6865

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

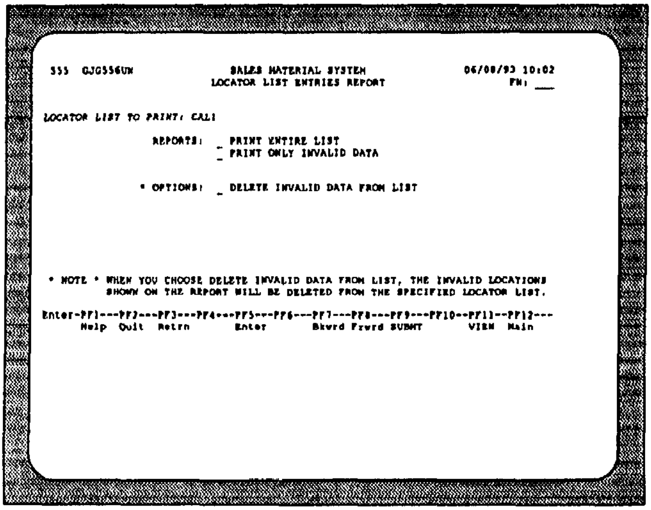
Print Locator Lists (Batch)

This option is used to print a locator list in batch mode. The report will not be printed until the nightly batch process runs.

1. Enter the locator code for the list you wish to print. Enter X beside the **PRINT (BATCH)** option and press [ENTER].

   ◆ *Note:* If you do not know the locator code, mark the **PRINT (BATCH)** option and press [ENTER] to select the locator list.

2. The following screen will be displayed:



3. Select the type of report you wish to print:
   - entire list
   - invalid data only

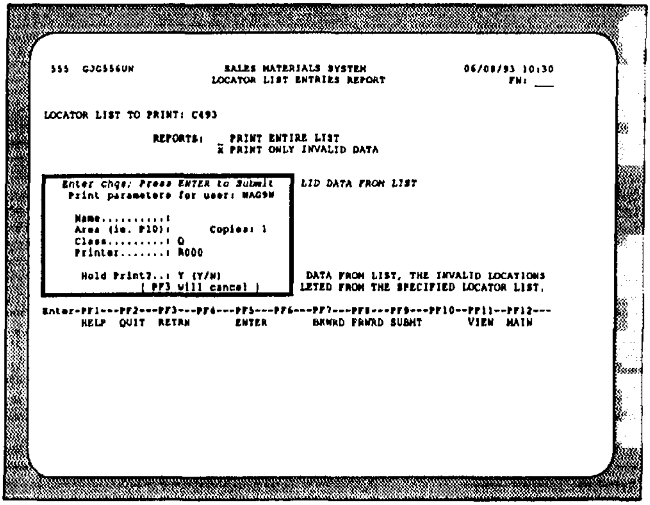
4. If you wish to delete the invalid data from the locator list, mark this option also. The invalid locators will still print on the report but will be removed from the actual list.

5. When you are ready to continue, press [SUBMIT]. The following pop-up window is displayed:

51846 6866

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



6. This window indicates where the report will be printed and whose name will appear on the cover sheet.

   Review the **NAME, AREA, PRINTER** and **COPIES** indicated. If you wish to change them, you may do so. If these fields do not contain entries, they must be specified.

   Also, make sure the **HOLD PRINT** option is set to **N**. Otherwise, the report will only be available online.

7. Press [ENTER] to submit the report request, or [PF3] to cancel.

51846 6867

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6868

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 5
Other Procedures

51846 6869

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

OTHER PROCEDURES

Staging Orders

Staging orders is sometimes required because occasionally a storage unit cannot physically hold all items being shipped. In those cases, shipments may need to come in waves.

I. Review allocations to various ship-to locations. Assess size (sq. ft.) and capacity by location with appropriate sales rep input. Base staging on ship-to capacity and unique timing circumstances.

II. Utilize Voice Mail to announce to all concerned parties that items will be ordered shortly. Instruct reps to call if they wish to alter the planned order sequence. Otherwise, order as usual.

III. After orders have been placed, sales representatives are responsible for communicating needs (which differ from original planned timing noted in Workplan Book) via voice mail or other correspondence.

IV. Reorder and note in Workplan Book as necessary until allocated quantities are zeroed out.

Troubleshooting Premiums

I. Receive voice mail, phone call or written request from sales rep identifying either a surplus or lack of promotions. These situations normally occur near the end of a reporting period. While a periodic question might be posed via voice mail by the Operations Unit personnel, the responsibility of notification of these issues should remain the sales rep's accountability. The improvement in Division Management work, with time, should reduce these issues.

II. Once a problem is communicated, voice mail will be utilized to advise other personnel of surplus/deficit and ask for assistance (i.e., who has additional available premiums or is in need of premiums).

III. Once parties are "connected" the Operations Unit will expedite transfer of items by shipping from operations backroom, accepting shipment from sales rep or arranging shipment between two or more sales reps.

Handling Incremental Promotional Programs

I. Receive information regarding incremental program details from Region (i.e., budget, guidelines, etc.)

II. With Region Operations Manager determine chain account needs/opportunities. Contact CAMs via phone/voice mail. Split budget or items accordingly.

III. Determine Division needs/opportunities. Contacts DMs via phone/voice mail. Split budget by sales rep based on unique opportunity communicated by DM or sales rep via voice mail).

IV. Order items to ship-to locations, as previously noted in the Order Premium section.

51846 6870

© R.J. Reynolds Tobacco Company 1993

V. The coordinator will track and monitor against budget, keeping appropriate management apprised of status. The Region Operations Manager will evaluate trends, usage and respond accordingly.

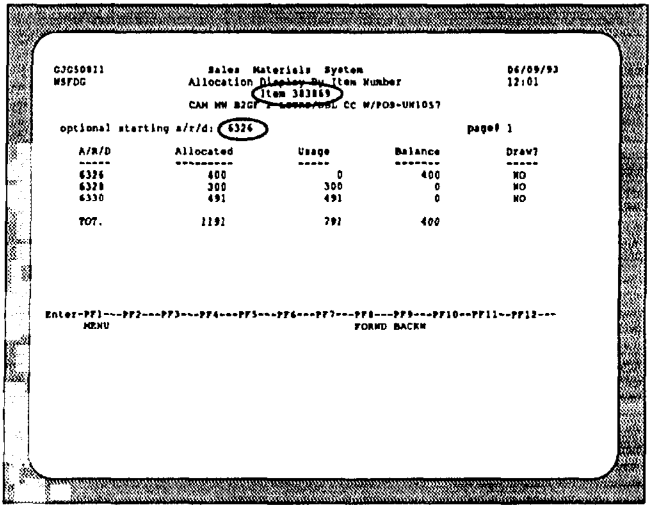
Utilizing Leftover Premiums

I. Sales Reps are responsible for communicating leftovers in the field. The operation unit is responsible for leftovers in SMS. Check via function 524 or 508. When the commodity number is known, utilize function 508.

Function 508

Using SMS Function 508

1. With the SMS Main Menu displayed, enter 508 in the FN field and press [ENTER]. The following screen will be displayed.



2. After inputting commodity number and starting operating unit level, the system will provide a current status report of that item's availability.

51846 6871

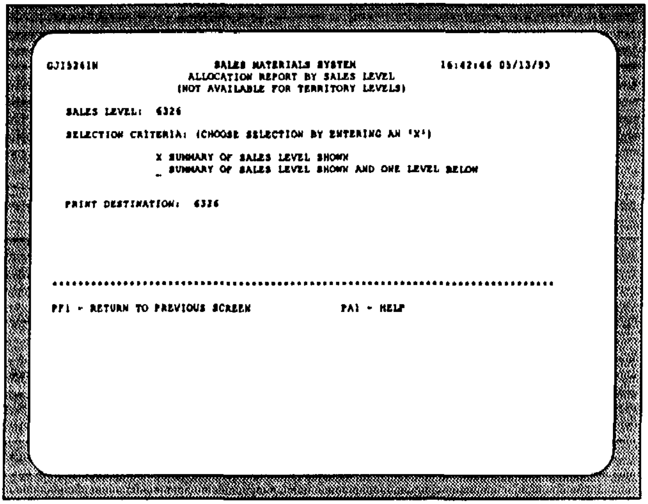
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 524

Using SMS Function 524

1. With the SMS Main Menu displayed, enter 524 in the FN field and press [ENTER]. The following screen will be displayed. Type "X" next to Summary of Sales Level Shown and press [ENTER].



2. The report is similar to the following:

GJ182RN ALLOCATION BY SALES LEVEL REPORT

SUMMARY REPORT: 6328 DULUTH DISTRICT

MAJOR CATEGORY: COUPONS ______________________

ITEM	DESCRIPTION	ALLOCATED	USED	REMAINING	ALLOC ABOVE
111111	MAG/STER 350 92 OOC 22487				YES
123456	MAG/STER 92 .35/PK VPR	40	40	36	
123457	MAG/STER 92 .35/PK OPC	2	2	0	
123458	MAG/STER 92 300 VPR	10	10	0	
123459	MAG/STER 92 350 CTN VPR	101	101	0	
234567	CAMEL GM 02 200/CTN 22054	20	20	0	
234568	DORAL 600/CARTON VPR	10	10	0	
234569	WIN 5B FREE PK BOOK	20	20	0	
345678	VAN 4 QTR 4OCC T-23004	129	129	0	
345679	WIN 4Q 1.5/2 PKS 22816	319	319	0	
456789	DORAL 65 PACK VPR	381	381	41	
456799	DORAL 700 CTN VPR	50	50	23	
567890	MAG/STER 400 CTN VPR	190	190	13	
567891	CAMEL GM 150 OCC 23286	60	60	0	
567892	SALEM 1Q93 900 2/CTN-300	41	41	0	
567892	SALEM 1Q93 300/CTN	23	23	0	
567893	WIN 1Q93 1.5/3 PKS 30027	13	13	0	
567894	WIN .60 VPR 4 Q	27	27	22	
567895	WIN FET 3 OCC 23340	4	4	0	

II. Once the problem is identified, Region Operations Manager develops program for utilization in high volume outlet. This program will be developed by discussing the situation with appropriate CAMs/DMs.

Coordinate delivery/packing of promos with appropriate management

III. If no clear opportunity for mass displays exists, utilize voice mail to determine which sales reps could utilize extra premiums and coordinate accordingly.

51846 6873

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

IV. Finally, if no opportunity for utilization in Region is present, DT or E-Mail other Regions and *inform them of availability.*

Tracking/Monitoring Full-Price Promotions

I. Since promotions are tracked by shipment data, no placement data will be monitored. The exception to this guideline is coupons — these items will still be reported by sales reps and tracked as indicated in Book II - Promotion Coordinator.

II. Monitor SMS function 524 to double check to ensure proper utilization of allocated items. This provides allocation versus shipment tracking. (See procedures above.)

III. If problems are noted via SMS 524, determine where error is and handle appropriately.

Coordinating POS/PDI

I. Division informed to update POS by deadline date.

II. Sales reps receive update process. Process will allow for reps to enter brand-specific needs into handheld computer while they are in the store. Time allowed to complete this update will be one to two months.

III. After deadline date, Winston-Salem will pull report and individually pack boxes per exact sales rep requests. Added to total will be an additional 5% for shipment to centralized warehouse to cover new stores, errors, etc.

IV. Promotion coordinator will pull up a report noting sales reps requests. One copy will be sent to reps and the master copy retained in operations unit complex.

Maintaining Goals

This task will not occur except regarding coupon items. See Book III for more information.

Troubleshooting Additional Problem Areas

I. Promotion Coordinator will be responsible for troubleshooting the following problem areas.

- Shipments
- Damages
- Shortages

51846 6874

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Direct Accounts
  - shipments
- RJR Warehousing
  - shipments
  - palletize problems
  - stretchwrap problems
  - packing issues
  - quality problems
  - bills of lading
  - shipping information
  - return authorizations
- Allocations
- System issues

51846 6875

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 6
Ordering Coupons

51846 6876

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ORDERING COUPONS

Summary

- Develop and provide sales reps with coupon requisition forms and coupon transfers/return forms. These items should be utilized consistently by reps.
- Ensure SIS number is assigned to each sales rep's home address. This will be utilized to ship requests to these locations, if necessary.

Procedures

I. Sales representatives send in requests for coupons to Region Operations Unit. These requests may take several forms:

- Utilize Coupon Requisition form. This should be the most frequently used method. Reps must be accountable for proper planning to ensure ongoing needs can be reasonably met using this form.
- Utilize voice mail or telephone operations unit directly. This method should be utilized when situations call for quick turnaround time.

II. Prior to any order placement, you should have a general idea of the current size of pertinent allocations in SMS. This can be done easily by pulling SMS function 524 - Allocation by Item Report — once per week. This report breaks down allocated items, by category, noting quantities available. This step is important since this information is used to estimate whether enough coupons exist to satisfy current and future coupon requests.

51846 6877

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 524

Using SMS Function 524

1. With the SMS Main Menu displayed, enter 524 in the FN field and press [ENTER].

```
Press ENTER to continue or enter a function from the list below
  1   UTIMENU                         SALES MATERIALS                  05/10/93
 PROD - SMSLIB                          MAIN MENU                         08:11
 ------------- COPYRIGHT (C) R J REYNOLDS TOBACCO CO 1989 ----------------------
 001 - SMS SECURITY LEVEL M          |   524 - ALLOC BY SALES LEVEL RPT
 022 - SKU USAGE BY ITEM BY MONTH    |   525 - ALLOCATION TRANSFER AUDIT RPT.
 030 - SMM & TRAFFIC PHONE DIRECTORY |   551 - WORKPLAN COMMUNICATIONS
 116 - FIND BACKORDERS FOR LOCATION  |   555 - WORK PLANS
 125 - FS COUPON RECEIPTS            |   559 - DIVISION MARKETING INDICATORS
 126 - FS COUPON RECEIPT CORRECTION  |   560 - PROMOTIONAL WKP BUDGET REPORTS
 210 - ITEM MASTER DISPLAY F/S       |   570 - WORKPLAN COMMUNICATIONS REPORT
 402 - ENTER ORDERS                  |   572 - FULL-PRICED WORKPLAN BUDGET
 404 - ORDER INQUIRY                 |   598 - WORKPLAN BOOK REPRINT
 405 - LIST OF MATERIALS             |   599 - WORKPLAN BUDGET USAGE REPORT
 406 - please test this new order inq |  803 - PRINT REPORT STATUS SCREEN
 417 - SPECIAL HANDLING              |   903 - DISPLAY USER MESSAGES
 501 - SMS ALLOCATION MAINTENANCE    |   983 - TRANSFER TO SIS MENU
 508 - SMS ALLOCATION SEARCH BY ITEM |   999 - EXIT SYSTEM
 509 - SMS ALLOCATION TRANFERS       |
 523 - ALLOC BY ITEM REPORT          |
 -------------------------------------------------------------------------------
                                                                        FN: 524
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      MENU
```

51846 6878

© R.J. Reynolds Tobacco Company 1993

2. The following screen will be displayed. Verify the sales level, mark an "X" beside your selection criteria and verify the print destination. Press [ENTER].

```
GJ1524IN              SALES MATERIALS SYSTEM              08:19:39 05/18/93
                  ALLOCATION REPORT BY SALES LEVEL
                 (NOT AVAILABLE FOR TERRITORY LEVELS)

  SALES LEVEL:  6326

  SELECTION CRITERIA: (CHOOSE SELECTION BY ENTERING AN 'X')

               _ SUMMARY OF SALES LEVEL SHOWN
               X SUMMARY OF SALES LEVEL SHOWN AND ONE LEVEL BELOW

  PRINT DESTINATION:  6326



*****************************************************************************

PF1 - RETURN TO PREVIOUS SCREEN            PA1 - HELP
```

51846 6879

© R.J. Reynolds Tobacco Company 1993

3. The screen will display a message indicating that the report was successfully submitted. Press [ENTER] to return to the SMS Main Menu. *Below is a sample of this report.*

GJ102RN ALLOCATION BY SALES LEVEL REPORT

SUMMARY REPORT: 6320 DULUTH DISTRICT

MAJOR CATEGORY: COUPONS ______________________

ITEM	DESCRIPTION	ALLOCATED	USED	REMAINING	ALLOC ABOVE
111111	MAG/STER 350 92 OOC 22487				YES
123456	MAG/STER 92 .35/PK VPR	40	40	36	
123457	MAG/STER 92 .35/PK OPC	2	2	0	
123458	MAG/STER 92 300 VPR	10	10	0	
123459	MAG/STER 92 350 CTN VPR	101	101	0	
234567	CAMEL GN 02 200/CTN 22054	20	20	0	
234568	DORAL 600/CARTON VPR	10	10	0	
234569	WIN SR FREE PK BOOK	20	20	0	
345678	VAN 4 OTR 4OCC T-23004	129	129	0	
345679	WIN 4Q 1.5/2 PKS 22816	319	319	0	
456789	DORAL 65 PACK VPR	381	381	41	
456799	DORAL 700 CTN VPR	50	50	23	
567890	MAG/STER 400 CTN VPR	190	190	13	
567891	CAMEL GN 150 OCC 23286	60	60	0	
567892	SALEM 1Q93 900 2/CTN-300	41	41	0	
567892	SALEM 1Q93 300/CTN	23	23	0	
567893	WIN 1Q93 1.5/3 PKS 30027	13	13	0	
567894	WIN .60 VPR 4 Q	27	27	22	
567895	WIN FRT 3 OCC 23340	4	4	0	

If no allocation exists for a desired coupon, the PRC has three alternatives:

- Request from Sales Area
- Request from other Divisions/Regions
- Manufacture coupons via Coupon Printer @ office. (see pages 1-10).

III. Process the coupon requisitions one by one.

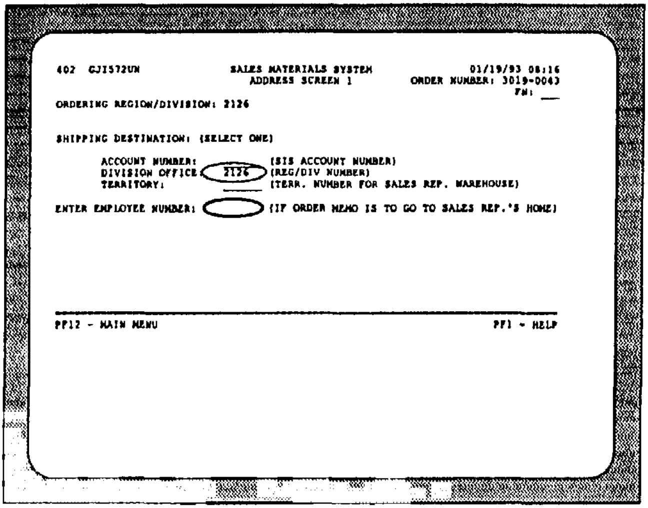
51846 6880

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Ordering Coupons Via SMS Function 402

1. Log on to SMS and invoke function 402, Order Entry. The following screen is displayed:



2. Enter the appropriate information and press [ENTER]. For demonstration purposes we have entered a Division of 2126. Each order for coupons should be sent directly to the requester's home address or outside storage.

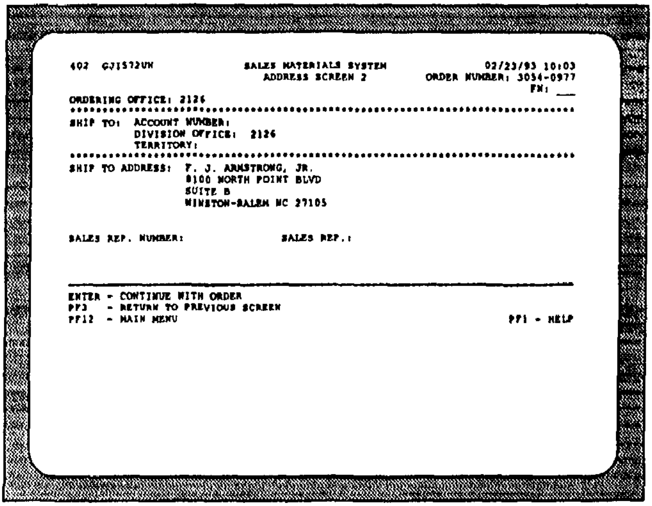
   - *Note:* Coupon Storage at the Division and Operations Unit office should be eliminated or at least minimized.

3. The order entry ship-to screen will be displayed:

51846 6881

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



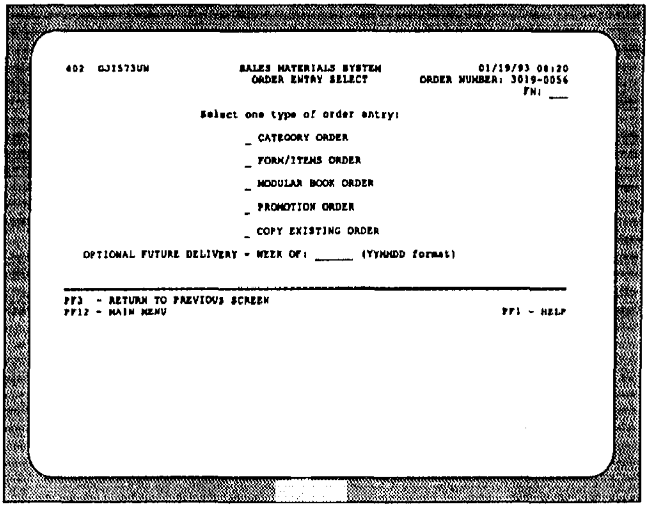
4. Verify that this information is correct.

5. Press [ENTER] to continue. The order type selection screen will be displayed:

51846 6882

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



```
402  GJIS73UN          SALES MATERIALS SYSTEM           01/19/93 08:20
                        ORDER ENTRY SELECT       ORDER NUMBER: 3019-0056
                                                                  FN: __

                   Select one type of order entry:

                          _ CATEGORY ORDER

                          _ FORM/ITEMS ORDER

                          _ MODULAR BOOK ORDER

                          _ PROMOTION ORDER

                          _ COPY EXISTING ORDER

  OPTIONAL FUTURE DELIVERY - WEEK OF: _____ (YYMMDD format)

PF3  - RETURN TO PREVIOUS SCREEN
PF12 - MAIN MENU                                              PF1 - HELP
```

6. Select the type of order you wish to create:

   - CATEGORY ORDER - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
   - FORM/ITEMS ORDER - Use this option when the commodity numbers of items are known.
   - MODULAR BOOK ORDER - Currently unavailable (future enhancement)
   - PROMOTION ORDER - Use this option to order items for a promotion.
   - COPY EXISTING ORDER - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.

7. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the **WEEK OF** field. The date specified cannot be more than 210 days into the future, and must be entered in YYMMDD format.

51845 6883

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. Press [ENTER] to continue.

9. The next section contains a summary of the process for using any of the order types. It is followed by detailed instructions for each order type.

Summary of Process

1. At the order type selection screen, select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.

2. Press [ENTER] to continue.

   - *If you have requested a Category order:*
     - The system will prompt you to select a major category. For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
     - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
   - *If you have requested a Form/Items order:*
     - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].
   - *If you have requested a Promotion order:*
     - To view a specific type of promotion, position the cursor in the **TYPE** column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
     - Select the promotion for which you wish to order items
     - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
   - *If you are copying an existing order:*
     - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
     - The system will then list the items/quantities associated with the specified order. (This screen is similar to Form/Items Order.) Enter/modify items/quantities for the new order you are creating and press [PF4].

51846 6884

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.

4. If all items requested are in inventory, the Order Completion screen is displayed. If all items are not in inventory the Inventory Exceptions screen is displayed.

5. From either screen you can request special handling.

6. When you are ready to process the order, press the appropriate PF key ([PF4] from the Order Completion screen; [PF4] or [PF5] from the Inventory Exceptions screen).

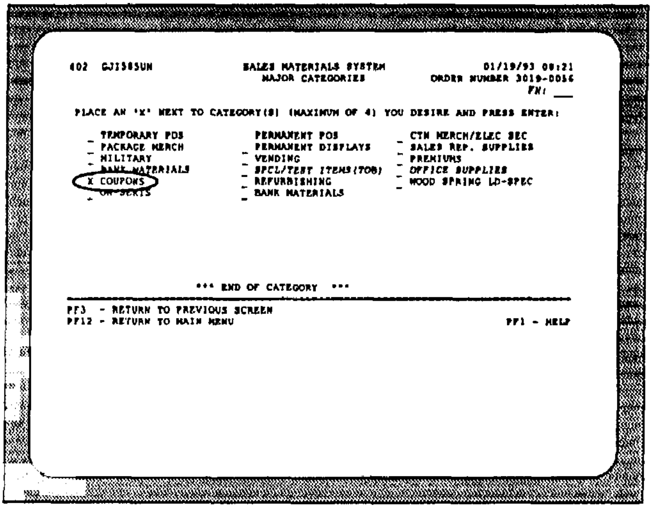
51846 6885

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Category Order

Use this option when you want to select the items to be ordered by category, such as permanent POS items, premiums, coupons, etc.

1. When Category Order is selected, the Major Categories screen is displayed:



2. Enter X beside the categories you wish to select from. Up to 4 categories can be selected at one time.

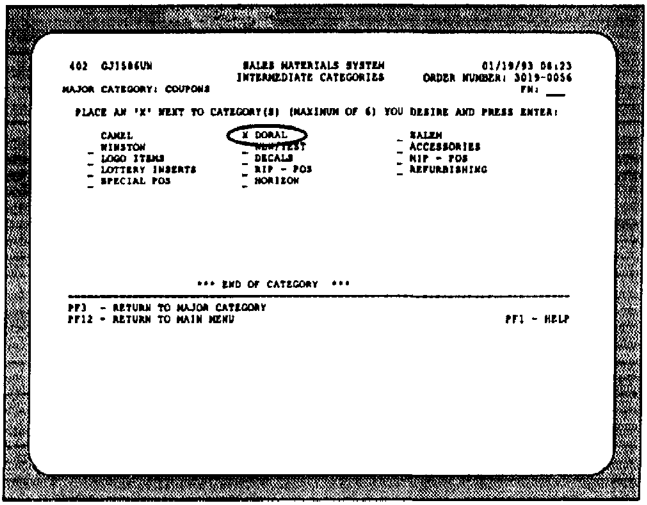
3. Press [ENTER] to continue.

51846 6886

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The Intermediate Categories screen is displayed for the first major category selected:



5. Enter X beside the categories you wish to select from. Up to 6 categories can be selected at one time.

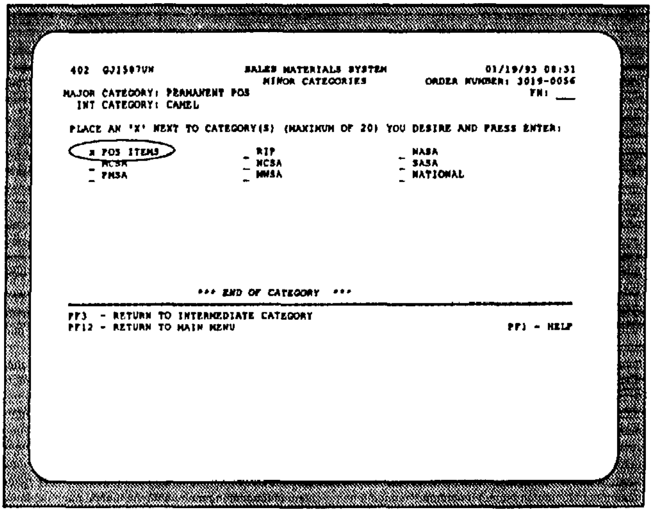
6. Press [ENTER] to continue. If multiple major categories were selected, intermediate categories for the next major category will be displayed. This process will continue until intermediate categories have been selected for each major category.

51846 6887

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. When intermediate categories have been selected for each major category, the Minor Categories screen is displayed. This screen lists minor categories for the first major/intermediate category combination:



8. Enter X beside the categories you wish to select from. Up to 20 categories can be selected at one time.

9. Press [ENTER] to continue. If multiple intermediate categories were selected or multiple major categories were selected, minor categories for the next intermediate category will be displayed. This process will continue until minor categories have been selected for each major/intermediate category combination.

51846 6888

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

10. When minor categories have been selected for all major/intermediate categories, the system will list the items associated with the category *combinations requested. This list will begin with the first major/ intermediate/minor category specified:*

```
402  GJ1507U1              SALES MATERIALS SYSTEM             01/19/93 08:31
                            ITEM QUANTITY ENTRY        ORDER NUMBER: 3019-0056
MAJOR CATEGORY: PERMANENT POS
  INT CATEGORY: CAMEL
MINOR CATEGORY: POS ITEMS                          MAXIMUM ORIGINAL  L   REMAIN
 SK                                                  ORDER    ALLOC  E    ALLOC
QTY    ITEM  ---DESCRIPTION----------- UNITS/SKU       QTY      QTY  V      QTY
____ 208353 CAMEL 3-D CIGARETTES SOL     10 BOX                   0           0
____ 208408 CAMEL BUSINESS HOURS OPE     10 BOX                   0           0
____ 390898 CAMEL BATTERY CLOCK           6 BOX                  10  D       10
____ 390920 CAMEL FLOOR ASHTRAY           2 BOX                  10  D       10
____ 390942 CAMEL LANE CLOSED            20 BOX                  15  D       15
____ 390964 CAMEL NEON                    1 BOX                  15  D       15
____ 391030 CAMEL PRICING BANNER 6'X     25 BOX                   2  D        2
____ 391063 CAMEL GROUND MOUNT            1 BOX                  10  D       10
____ 391074 CAMEL POLE MOUNT              1 BOX                  22  D       22
____ 391085 CAMEL CURB MOUNT              1 BOX                   5  D        5

                    *** MORE DATA EXISTS ***
------------------------------------------------------------------------------
PF3 - PREVIOUS SCREEN
PF4 - CONTINUE WITH ORDER                                 PF12 - MAIN MENU
PF7 - START OF DATA                                       PF1  - HELP
```

11. For each item, this screen indicates the maximum order quantity, current *allocation quantity, and remaining allocation quantity (if any).*

12. Specify the quantity of each item you wish to order in the QTY field. If you do not want an item, leave the quantity field blank. If multiple pages of items *exist, press [ENTER] to scroll forward.*

13. If you have specified more than 1 major, intermediate or minor category, there will be a screen like this for each combination. Press [ENTER] to view *additional screens of information and enter quantities.*

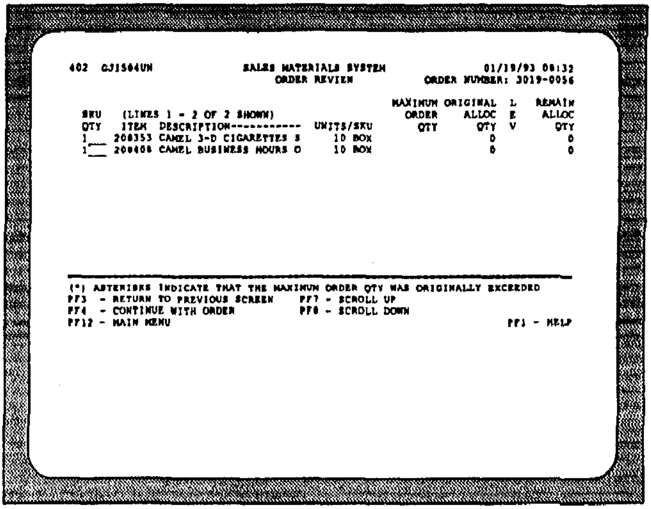
14. When you have entered quantities for the desired items, press [PF4] to continue with the order.

51846 6889

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

15. The system now displays the order for you to review:



```
402  GJ1504UN              SALES MATERIALS SYSTEM            01/19/93 08:32
                              ORDER REVIEW            ORDER NUMBER: 3019-0056

                                                 MAXIMUM ORIGINAL  L   REMAIN
SKU   (LINES 1 - 2 OF 2 SHOWN)                    ORDER    ALLOC   E    ALLOC
QTY   ITEM  DESCRIPTION------------  UNITS/SKU    QTY      QTY    V     QTY
1___  208353 CAMEL 3-D CIGARETTES 5    10 BOX               0            0
1___  208408 CAMEL BUSINESS HOURS O    10 BOX               0            0

(*) ASTERISKS INDICATE THAT THE MAXIMUM ORDER QTY WAS ORIGINALLY EXCEEDED
PF3  - RETURN TO PREVIOUS SCREEN    PF7 - SCROLL UP
PF4  - CONTINUE WITH ORDER          PF8 - SCROLL DOWN
PF12 - MAIN MENU                                               PF1 - HELP
```

16. This is the SMS Order Review screen. It displays the required SKU quantity of each item requested and units per SKU. It also indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).

17. As with the previous screen, you can modify the quantities indicated.

18. When you are ready to continue with the ordering process, press [PF4] to continue with the order entry process.

51846 6890

© R.J. Reynolds Tobacco Company 1993

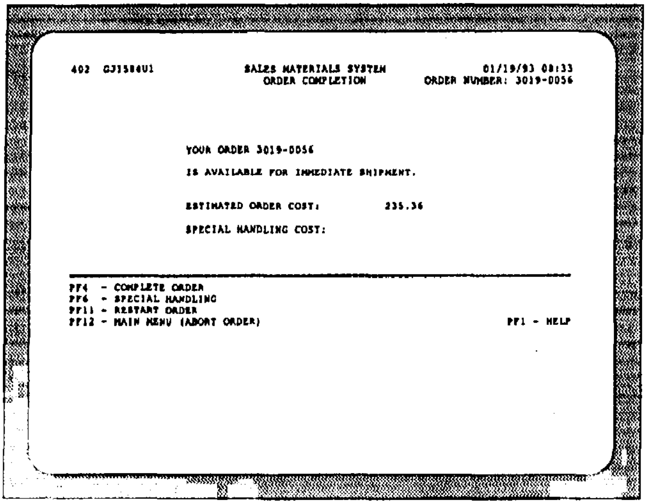
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

19. The system now checks the inventory to determine if all of the items needed are available. If any of the requested items are *not currently in inventory,* a screen will be displayed which lists the items/quantities that will be placed on backorder. This screen allows you to:

- Continue with this order and put the missing items on back order
- Continue with this order and cancel items on back order
- Suspend the order, reserving inventory for the available items
- Cancel the order

(This screen is shown in the discussion on entering a promotion order.)

20. If all items *are in inventory,* the system will display the Order Completion screen:



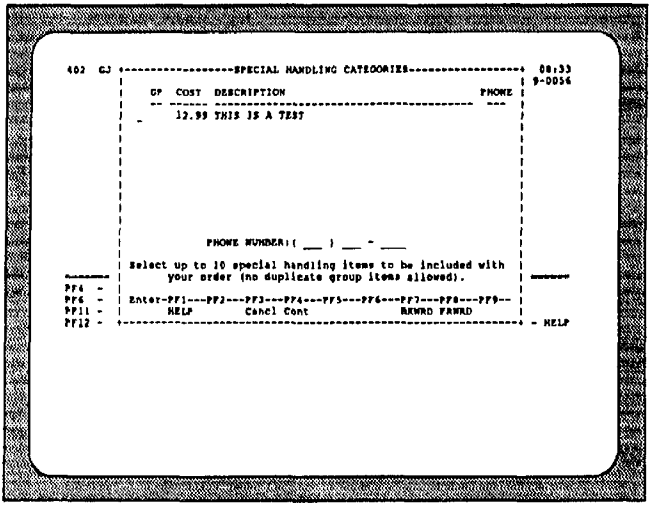
21. This screen provides you with your order number and cost.

WARNING: This is the point of no return! If you go forward from here, an order will be generated.

22. From this screen you can:

- Press [PF4] to continue with the order entry process. This should only be used if you are sure you want to generate the order!
- Press [PF6] to request special handling.
- Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
- Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

23. If you need to request special handling press [PF6]. The system will display a list of options for you to select from:



24. Enter X beside each option needed. Up to 10 options can be selected. When you are ready to continue press [PF4]. The system will return to the Order Completion screen and display the handling costs.

51846 6892

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

25. If you wish to generate the order press [PF4]. Otherwise, use one of the other options.

26. When [PF4] is pressed, the following pop-up window will be displayed:

```
402  GJI504U1          SALES MATERIALS SYSTEM          02/23/93 10:00
                          ORDER COMPLETION       ORDER NUMBER: 3054-0977

  YOUR ORDER 3054-0977

  IS A FUTURE ORDER FOR 93-03-29

  ESTIMATED ORDER COST:          145.65

  SPECIAL HANDLING COST:          12.99

+-------------------------SPECIAL INSTRUCTIONS--------------------------+
|                                                                        |
| Account Special Instructions: ________________________________         |
|                               ________________________________         |
|                                                                        |
+------------------------------------------------------------------------+
```

27. Enter any special instructions or sales rep information in the space provided. This entry is optional. (This information was previously entered on the Address Screen, but was moved due to processing procedures.)

28. When you are ready to continue, press [ENTER]. The order is generated and the following screen is displayed:

51846 6893

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
GJ1574U1                  SALES MATERIAL SYSTEM              12/17/92
                          ORDER ENTRY COMPLETED     ORDER NUMBER: 3019-0036

  YOUR ORDER 3019-0036 HAS BEEN SUCCESSFULLY PROCESSED.

   ESTIMATED ORDER COST :      605.66

   SPECIAL HANDLIGN COST:       12.99

******************************************************************************
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS
  PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS
 PF12 - RETURN TO MAIN MENU
```

29. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

30. From here you can:

- Press [ENTER] to process another order with a different ship-to address
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

51846 6894

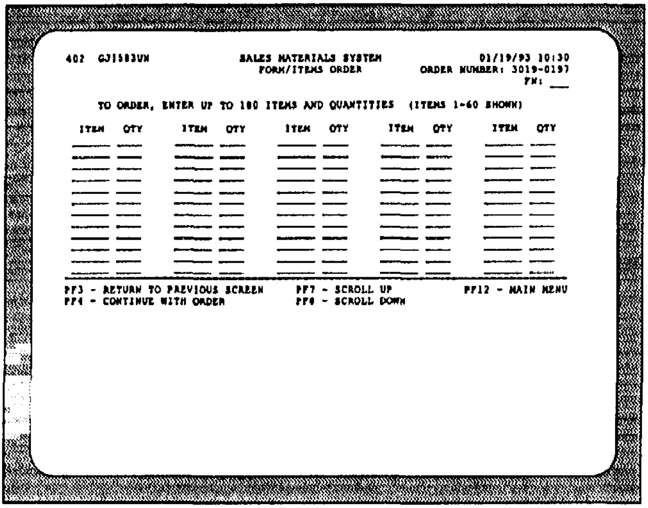
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Form/Items Order

Use this option when you want know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.

1. When Form/Items Order is selected, the following screen is displayed:



2. Enter the item number and quantity of each item you wish to order. Up to 60 different items can be specified.

3. Press [PF4] to continue. The Order Review screen will be displayed.

   On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

51846 6895

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The system now checks the inventory to determine if all of the items needed are available.

   - If any of the requested items are *not currently in inventory,* a screen will be displayed which lists the items/quantities that will be placed on back-order.

     WARNING! This is the point of no return! If you go forward from here, an order will be generated!

   - If all items *are in inventory,* the system will display the Order Completion screen. This screen provides you with your order number and cost.

     WARNING! This is the point of no return! If you go forward from here, an order will be generated!

5. If you have reached the Order Completion screen, the same options are available as for the Category order type:

   - Press [PF4] to process this order. This should only be used if you are sure you want to generate the order!
   - Press [PF6] to request special handling.
   - Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
   - Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

6. When you are ready to generate the order, press [PF4]. The order is generated and the following screen is displayed:

51846 6896

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
GJ1578U1                 SALES MATERIAL SYSTEM                  12/17/92
                         ORDER ENTRY COMPLETED      ORDER NUMBER: 3154-1307


  YOUR ORDER 3154-1307 HAS BEEN SUCCESSFULLY PROCESSED.


   ESTIMATED ORDER COST :        145.63

   SPECIAL HANDLIGN COST:


*****************************************************************************
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS
  PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS
 PF12 - RETURN TO MAIN MENU
```

7. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

8. From here you can:

- Press [ENTER] *to process another order with a different ship-to address*
- Press [PF2] to process another order with the same ship-to address
- Press [PF12] to return to the SMS Order Entry Menu

51846 6897

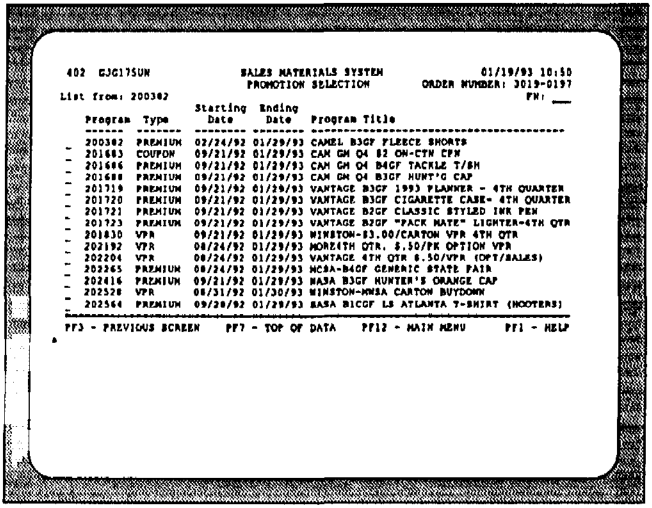
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Promotion Order

Use this option when you wish to order items for a particular promotion.

1. When Promotion Order is selected, the Promotion Selection screen is displayed:



402 GJG17SUN SALES MATERIALS SYSTEM 01/19/93 10:50
PROMOTION SELECTION ORDER NUMBER: 3019-0197
List from: 200302 FN: ___

Program	Type	Starting Date	Ending Date	Program Title
200302	PREMIUM	02/24/92	01/29/93	CAMEL B3GF FLEECE SHORTS
201683	COUPON	09/21/92	01/29/93	CAM GM Q4 $2 ON-CTN CPN
201686	PREMIUM	09/21/92	01/29/93	CAM GM Q4 B4GF TACKLE T/SH
201688	PREMIUM	09/21/92	01/29/93	CAM GM Q4 B3GF HUNT'G CAP
201719	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF 1993 PLANNER - 4TH QUARTER
201720	PREMIUM	09/21/92	01/29/93	VANTAGE B3GF CIGARETTE CASE- 4TH QUARTER
201721	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF CLASSIC STYLED INK PEN
201723	PREMIUM	09/21/92	01/29/93	VANTAGE B2GF "PACK MATE" LIGHTER-4TH QTR
201830	VPR	09/21/92	01/29/93	WINSTON-$3.00/CARTON VPR 4TH QTR
202192	VPR	08/24/92	01/29/93	MORE4TH QTR. $.50/PK OPTION VPR
202204	VPR	08/24/92	01/29/93	VANTAGE 4TH QTR $.50/VPR (OPT/SALES)
202265	PREMIUM	08/24/92	01/29/93	NCSA-B4GF GENERIC STATE FAIR
202416	PREMIUM	09/21/92	01/29/93	NASA B3GF HUNTER'S ORANGE CAP
202528	VPR	08/31/92	01/30/93	WINSTON-NWSA CARTON BUYDOWN
202564	PREMIUM	09/28/92	01/29/93	SASA B1CGF LS ATLANTA T-SHIRT (HOOTERS)

PF3 - PREVIOUS SCREEN PF7 - TOP OF DATA PF12 - MAIN MENU PF1 - HELP

2. To view additional pages of promotions, press [ENTER]. To return to the top of the list, press [PF7].

3. If you wish to narrow down this list to one particular type of promotion, position the cursor in the TYPE column and press [PF1] (HELP). A pop-up window will display the following options:

   - C Coupon Promotions
   - P BxGxF Promotions
   - R Premium Promotions
   - V VPR Promotions
   - '' (blank) All Promotion Types

   Enter the desired promotion type an press [ENTER]. The system will display only promotions for the type specified.

   ❖ *Note:* This step is optional.

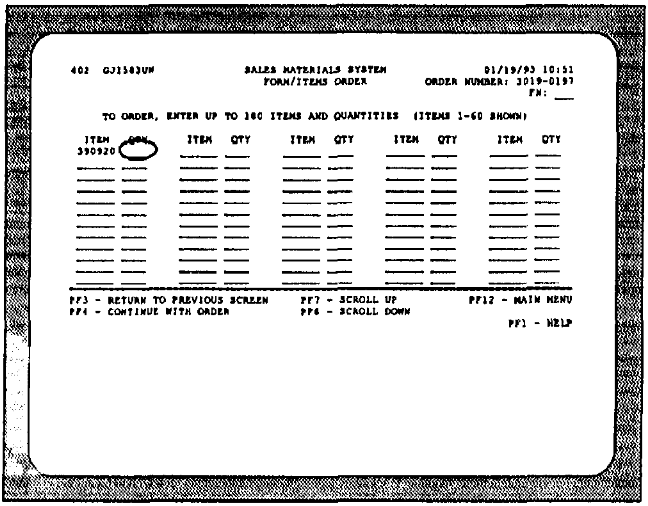
51846 6898

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Select the promotion you wish to order items for and press [ENTER]. Only 1 promotion can be selected.

5. The Form/Items Order screen will be displayed, listing each of the items needed for the promotion:



6. Enter the quantity of each item you wish to order in the **QTY** field. If you do not wish to order any item, leave the **ITEM** and **QTY** fields blank.

   You may also add other items/quantities on this screen. Up to 60 items can be specified on this screen.

7. When you are ready to continue with the order press [PF4]. The Order Review screen will be displayed.

   On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

51846 6899

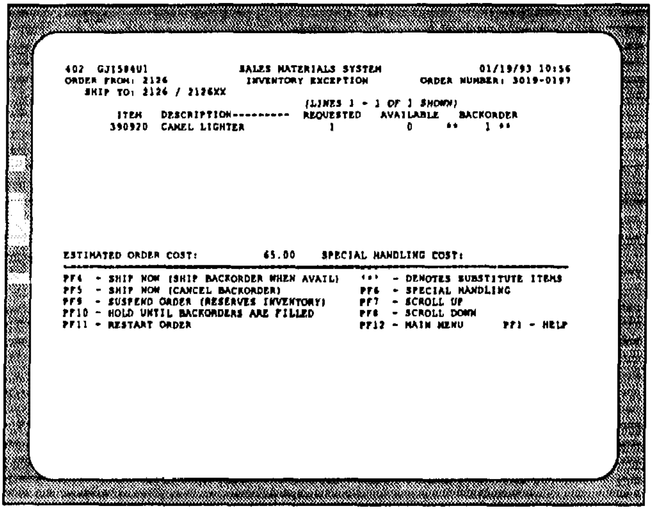
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. The system now checks the inventory to determine if all of the items needed are available.

   If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost. If you continue with the order process from this screen, the order will be generated.

9. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder:



10. For each item needed, this screen indicates the quantity requested, available, and on backorder. From this screen you can:

    - Press [PF4] to ship the available items and put the missing items on back order. This will process the order!
    - Press [PF5] to ship the available items and cancel the items on back order. This will process the order!
    - Press [PF6] to request special handling.
    - Press [PF9] to suspend the order. (This will reserve inventory for your order but will not process the order.) When [PF9] is pressed, you will be prompted to enter special Sales Rep instructions (optional).

51846 6900

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Press [PF10] to hold the entire order until backorders are filled. When [PF10] is pressed, you will be prompted to enter special Sales Rep instructions (optional).

- Press [PF11] cancel the entire order.

11. If you need to request special handling, press [PF6].

12. To continue with the order entry process, press [PF4] or [PF5]. The system will prompt you to enter any special Sales Rep instructions. When you are ready to continue, press [ENTER]. Your order will be generated and the following message is displayed:

    YOUR ORDER ####-#### HAS BEEN SUCCESSFULLY PROCESSED.

    At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

13. From here you can:

- Press [ENTER] to process another order with a different ship-to address

- Press [PF2] to process another order with the same ship-to address

- Press [PF12] to return to the SMS Order Entry Menu

51846 6901

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Copy Existing Order

Use this option when you wish to copy the items/quantities on an existing order to a new order. This is a fast way to create an order when the items/quantities for the two orders are similar.

1. When this option is selected the system will prompt you to enter the number of the order you wish to copy. The order specified must be a valid SMS order number.
2. When [ENTER] is pressed the Form/Items Order screen is displayed. This screen lists the items/quantities of the "copy from" order.
3. Modify the items/quantities, as desired. You may also add new items.
4. The remainder of this process is the same as for promotion orders. Refer to steps 7–13 in the previous section for additional information.
   - Requesting coupons from the Sales Area — utilize Sales Area guidelines to phone, fax or DT needs to appropriate personnel.
   - Requesting coupon from other Divisions. This option should be utilized when rapid turnaround time of Sales Rep coupon requests is not necessary. The most efficient method of requesting coupons is to determine which operating units have allocations of the coupon needed. To do so, utilize function 508.

51846 6902

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 508

1. With the SMS Main Menu displayed, enter 508 in the FN field and press [ENTER].

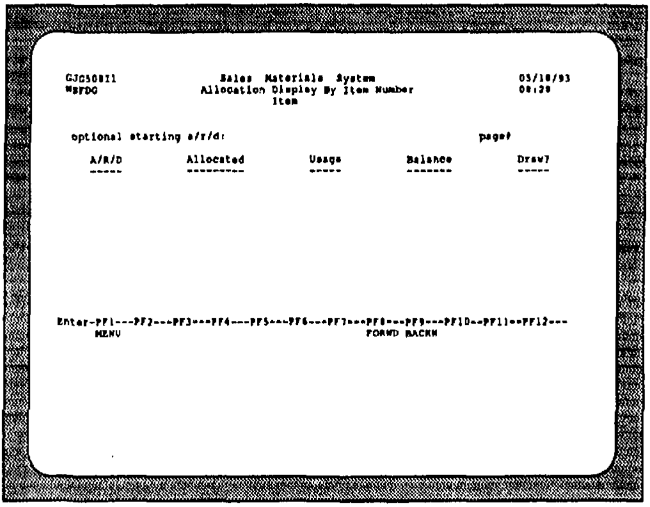
```
1   UTIMENU                     SALES MATERIALS                    05/10/93
PROD - SMSLIB                      MAIN MENU                           08:28
----------- COPYRIGHT (C) R J REYNOLDS TOBACCO CO 1989 ----------------
001 - SMS SECURITY LEVEL M          |  524 - ALLOC BY SALES LEVEL RPT
022 - SKU USAGE BY ITEM BY MONTH    |  525 - ALLOCATION TRANSFER AUDIT RPT.
030 - SMM & TRAFFIC PHONE DIRECTORY |  551 - WORKPLAN COMMUNICATIONS
116 - FIND BACKORDERS FOR LOCATION  |  555 - WORK PLANS
125 - FS COUPON RECEIPTS            |  559 - DIVISION MARKETING INDICATORS
126 - FS COUPON RECEIPT CORRECTION  |  560 - PROMOTIONAL WKP BUDGET REPORTS
210 - ITEM MASTER DISPLAY F/S       |  570 - WORKPLAN COMMUNICATIONS REPORT
402 - ENTER ORDERS                  |  572 - FULL-PRICED WORKPLAN BUDGET
404 - ORDER INQUIRY                 |  598 - WORKPLAN BOOK REPRINT
405 - LIST OF MATERIALS             |  599 - WORKPLAN BUDGET USAGE REPORT
406 - please test this new order inq |  803 - PRINT REPORT STATUS SCREEN
417 - SPECIAL HANDLING              |  903 - DISPLAY USER MESSAGES
501 - SMS ALLOCATION MAINTENANCE    |  983 - TRANSFER TO SIS MENU
508 - SMS ALLOCATION SEARCH BY ITEM |  999 - EXIT SYSTEM
509 - SMS ALLOCATION TRANFERS       |
523 - ALLOC BY ITEM REPORT          |
------------------------------------------------------------------------
                                                                 FN: 508
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      MENU
```

51846 6903

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The following screen will be displayed. Enter the coupon commodity number and the starting operating unit.



The results will indicate current usage and balances for Divisions, Regions and Sales Areas requested. Once specific operating units that appear to have ample allocations are identified, requests should be communicated via phone, fax, DT.

Printing Coupons

IV. If allocations cannot be obtained or quick turnaround time is necessary to supply coupons to the rep, coupon printers are available in Operations unit which should be utilized to produce appropriately valued coupons in desired amounts. This coupon printer should be utilized **only when allocations cannot be obtained elsewhere quickly enough**. Once coupons are printed, steps should be taken to ensure requesting party has coupons in hand within 1-3 days.

51846 6904

 © R.J. Reynolds Tobacco Company 1993

51846 6905

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MANAGING BACKROOM INVENTORIES

Summary

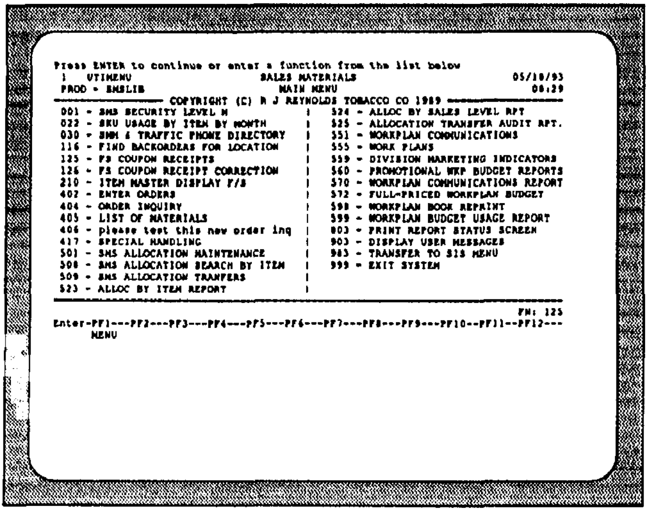
I. The requesting party will receive shipping ticket notifying them of estimated arrival date, types and quantities. Upon receipt of this ticket, the sales rep should go to the ship-to site and physically verify quantities and types actually received. Discrepancies between shipping ticket amounts and actual amounts received should be noted accordingly on the shipping ticket. The ticket is then mailed back to the Operations Unit within 24 hours of receipt.

II. Upon receipt by the Operations Unit of their copy of the shipping ticket, the Promotion Coordinator will access SMS function 125 to confirm that coupons were received. This is done by matching the order number of the shipment in question with the appropriate order number found on the computer screen. Input, by item, the actual quantity received as indicated on the shipping ticket (by SKUs). This number reduces the outstanding balance of the item by the amount input (i.e., if the quantities match, the item is officially "received" and removed from the list).

III. The Promotion Coordinator will match the original order documentation with the returned shipping verification. This review will entail searching for discrepancies between the two documents. Any differences can be adjusted with Miscellaneous Adjustments in CMS.

Function 125

1. With the SMS Main Menu displayed, enter 125 in the FN field and press [ENTER].



```
Press ENTER to continue or enter a function from the list below
 1   UTIMENU                    SALES MATERIALS                  05/10/93
 PROD - SMSLIB                     MAIN MENU                        08:29
----------------- COPYRIGHT (C) R J REYNOLDS TOBACCO CO 1989 -----------------
 001 - SMS SECURITY LEVEL M            |   524 - ALLOC BY SALES LEVEL RPT
 022 - SKU USAGE BY ITEM BY MONTH      |   525 - ALLOCATION TRANSFER AUDIT RPT.
 030 - SMM & TRAFFIC PHONE DIRECTORY   |   551 - WORKPLAN COMMUNICATIONS
 116 - FIND BACKORDERS FOR LOCATION    |   555 - WORK PLANS
 125 - FS COUPON RECEIPTS              |   559 - DIVISION MARKETING INDICATORS
 126 - FS COUPON RECEIPT CORRECTION    |   560 - PROMOTIONAL WKP BUDGET REPORTS
 210 - ITEM MASTER DISPLAY F/S         |   570 - WORKPLAN COMMUNICATIONS REPORT
 402 - ENTER ORDERS                    |   572 - FULL-PRICED WORKPLAN BUDGET
 404 - ORDER INQUIRY                   |   598 - WORKPLAN BOOK REPRINT
 405 - LIST OF MATERIALS               |   599 - WORKPLAN BUDGET USAGE REPORT
 406 - please test this new order inq  |   803 - PRINT REPORT STATUS SCREEN
 417 - SPECIAL HANDLING                |   903 - DISPLAY USER MESSAGES
 501 - SMS ALLOCATION MAINTENANCE      |   983 - TRANSFER TO SIS MENU
 508 - SMS ALLOCATION SEARCH BY ITEM   |   999 - EXIT SYSTEM
 509 - SMS ALLOCATION TRANFERS         |
 523 - ALLOC BY ITEM REPORT            |
------------------------------------------------------------------------------
                                                                      FN: 125
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      MENU
```

2. The following screen will be displayed. If coupons have been ordered, then the number, description and amount shipped will be displayed.

51846 6906

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

125 - M SALES MATERIALS FIELD SALES RECEIPT 93-05-18 08:29
UPD REC AMOUNT - PRESS PF2 OR- ENTER TO CONTINUE

RECEIVING DIVISION: 6326XX NEXT FUNCTION:

ORDER NUMBER	ITEM NUMBER	ITEM DESCRIPTION	SKU(S) SHIPPED	SKU(S) RECEIVED	OUTSTANDING BALANCE
31270614	382527	SVGS.'93 MB OPC 35 32121 12/	10		10
31270614	382538	SVGS.'93 MB OPC 40 32122 12/	20		20
31270614	382560	SVGS.'93 MB OPC 50 32124 12/	8		8
31241109	382560	SVGS.'93 MB OPC 50 32124 12/	5		5
31241109	382450	SVGS.'93 MB OCC 500 32135 12	4		4
31231915	409136	MULTIBRAND 500/CTN-33013-06/	8		8
31231906	409136	MULTIBRAND 500/CTN-33013-06/	11		11
31231896	409136	MULTIBRAND 500/CTN-33013-06/	8		8
31231888	409136	MULTIBRAND 500/CTN-33013-06/	11		11
31231879	409136	MULTIBRAND 500/CTN-33013-06/	8		8
31231871	409136	MULTIBRAND 500/CTN-33013-06/	12		12
31231851	409136	MULTIBRAND 500/CTN-33013-06/	11		11
31231846	409136	MULTIBRAND 500/CTN-33013-06/	10		10
31231837	409136	MULTIBRAND 500/CTN-33013-06/	8		8

ENTER - TO CONTINUE PF1 - MAIN MENU PF2-UPDATE

3. To receive coupons, [TAB] to the RECEIVED field and enter the number of coupons received and press [PF2] to update the screen.

4. The amount in the BALANCE field will be decreased by the amount entered in the RECEIVED field. If you receive the exact amount as shown shipped, then the item will be removed from the screen.

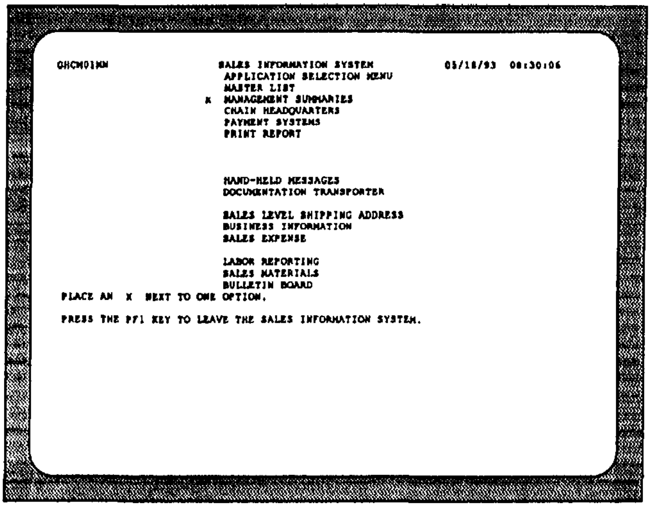
IV. On receipt, coupons must then be issued to appropriate Sales Reps. The Promotion Coordinator will access CMS in the Management Summaries option of the SIS main screen. All verified amounts are "issued" to the appropriate sales rep via this system. Once entered, CMS will automatically update the sales reps' on hand inventory based on this new data. A new enhancement to this screen now allows the operator to update the appropriate coupon goal in SIS by placing an "X" beside the pertinent item and sales rep.

51846 6907

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Issuing Coupons and Updating Goals

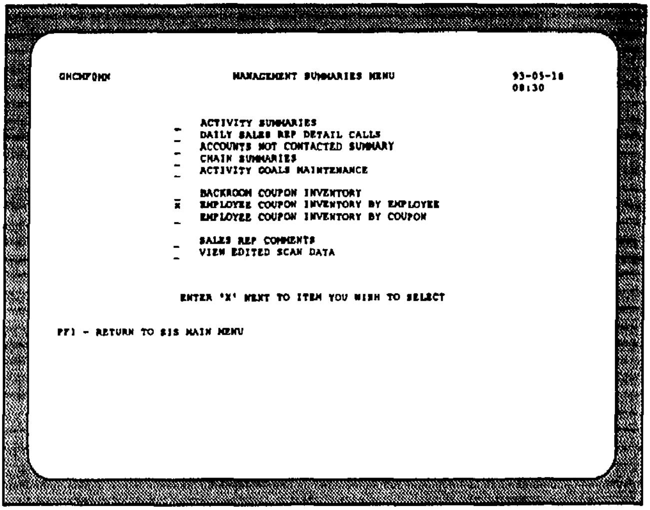
1. With the SIS Main Menu displayed, place an "X" beside "Management Summaries" and press [ENTER].



51846 6908

© R.J. Reynolds Tobacco Company 1993

2. Place an "X" beside "Employee Coupon Inventory by Employee" and press [ENTER].



51846 6909

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

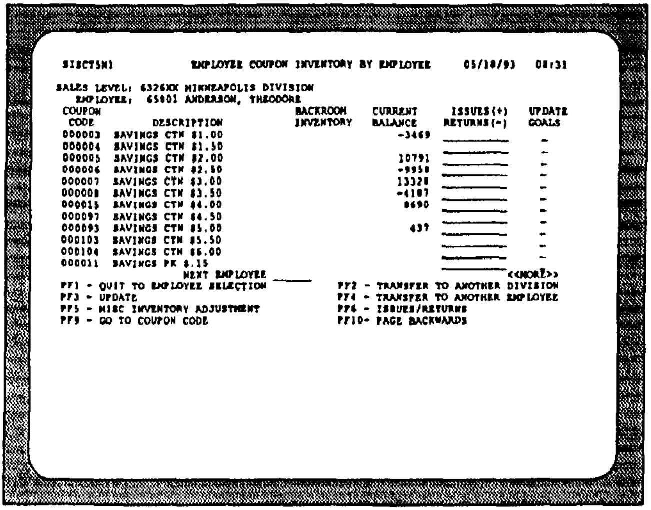
3. The following screen will be displayed. Place an "X" beside the desired employee and press [ENTER].

```
BISCT4N1                    EMPLOYEE SELECTION              05/18/93   08:31
SALES LEVEL: 6326XX MINNEAPOLIS DIVISION

        SELECT     EMPLOYEE #         EMPLOYEE NAME
          _           51191         SHILDEN, D
          X           65801         ANDERSON, THEODORE
          _           67873         LINDGREN, VIRJEAN
          _           69286         GOUDREAULT, THOMAS
          _           71456         HUGHESDON, HAROLD
          _           72194         HAMILTON, BRIAN
          _           73234         ADEMINO, JOSEPH
          _           76335         LUKO, JAY
          _           77489         OMAN, WADE
          _           77519         FARNUM, AMY
          _           77946         ONISKIN, SALLY
          _           78033         ENGEL, MICHAEL
          _           78079         PELPHREY, MATTHEW
          _          822745         KARNOWSKI, KAREN
          _          824450         TEMPLIN, MARY
                                                                    <<MORE>>
PF1 - QUIT TO MENU                          PF8  - REMOVE EMPLOYEE
PF9 - ADD/GOTO EMPLOYEE #                   PF10 - PAGE BACKWARDS
```

51846 6910

© R.J. Reynolds Tobacco Company 1993

4. An instructional screen will be displayed. Press [ENTER] to display the following screen.



SIECT5N1 EMPLOYEE COUPON INVENTORY BY EMPLOYEE 05/18/93 08:31

SALES LEVEL: 6326XX MINNEAPOLIS DIVISION
EMPLOYEE: 65801 ANDERSON, THEODORE

COUPON CODE	DESCRIPTION	BACKROOM INVENTORY	CURRENT BALANCE	ISSUES(+) RETURNS(-)	UPDATE GOALS
000003	SAVINGS CTN $1.00		-3469	________	_
000004	SAVINGS CTN $1.50			________	_
000005	SAVINGS CTN $2.00		10791	________	_
000006	SAVINGS CTN $2.50		-9958	________	_
000007	SAVINGS CTN $3.00		13328	________	_
000008	SAVINGS CTN $3.50		-4187	________	_
000015	SAVINGS CTN $4.00		8690	________	_
000097	SAVINGS CTN $4.50			________	_
000093	SAVINGS CTN $5.00		437	________	_
000103	SAVINGS CTN $5.50			________	_
000104	SAVINGS CTN $6.00			________	_
000011	SAVINGS PK $.15			________	

NEXT EMPLOYEE ______ <<MORE>>

PF1 - QUIT TO EMPLOYEE SELECTION
PF2 - TRANSFER TO ANOTHER DIVISION
PF3 - UPDATE
PF4 - TRANSFER TO ANOTHER EMPLOYEE
PF5 - MISC INVENTORY ADJUSTMENT
PF6 - ISSUES/RETURNS
PF9 - GO TO COUPON CODE
PF10- PAGE BACKWARDS

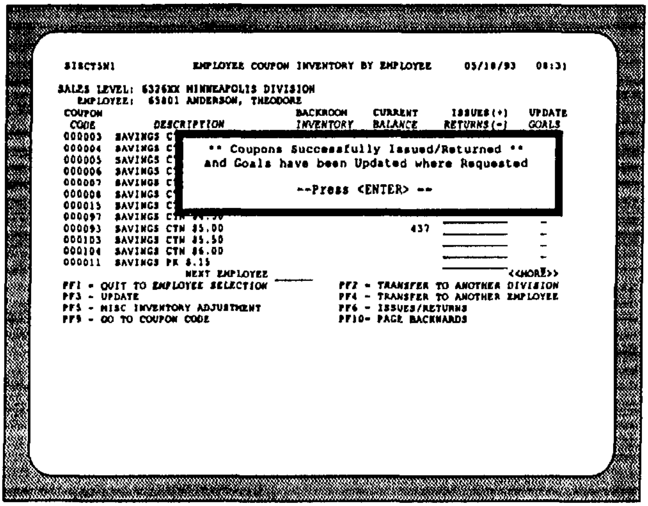
5. To update coupon goals, enter the amount to "issue" or "return" and place an "X" in the UPDATE GOALS field. Press [PF3].

51846 6911

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. If the update was successful, the message that goals have been updated will be displayed in a window. Press [ENTER] to close the window.



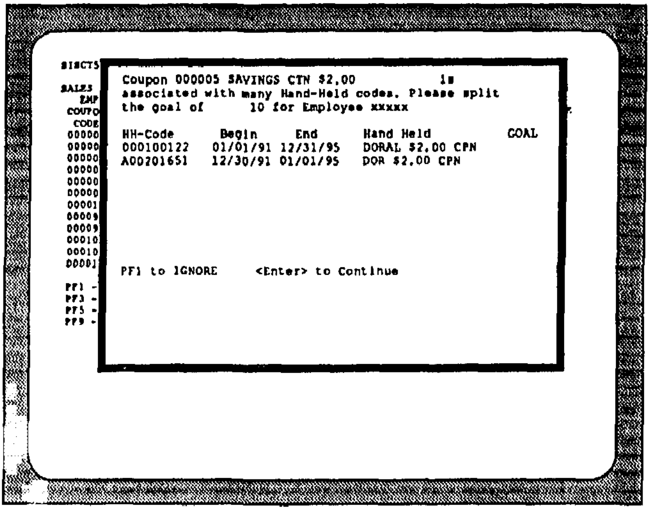
- If the coupon is not linked to any handheld code, the window will display the message indicating that the goals cannot automatically be updated. Press [ENTER] to exit this window and to issue/return coupons.
  Division does not have an allocation for a specific brand/denomination, then that handheld code will not be setup ("linked" for your Division) and you will not be able to update Activity Goals for that brand/denomination.

51846 6912

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. If you try to update goals which have many handheld codes associated with them (i.e., all the different brands in the savings or full-price categories), then this window will display the handheld codes associated with this coupon.



8. Divide the goals appropriately between handheld codes by keying in the amount. Please note the "begin" and "end" dates displayed when there are two identical descriptions. New handheld descriptions are often established with new quarters.

9. Press [ENTER] to complete the process.

V. In cases where transfers between reps occur, a transfer form should be developed for sales reps to submit to the Promotion Coordinator. Anytime a transfer among personnel occurs, this form must be completed and sent to the Operations Units. Once received, this transfer should be noted by making the positive and negative entries under the appropriate reps' names in the CMS system.

51846 6913

© R.J. Reynolds Tobacco Company 1993

COUPON TRANSFERS/RETURNS FORM

COUPON TRANSFERS (FROM ONE REPRESENTATIVE TO ANOTHER)

FROM Name/Div/Dist #	TO Name/Div/Dist#	Quantity	Description/Item #

COUPON RETURNS TO WINSTON-SAL

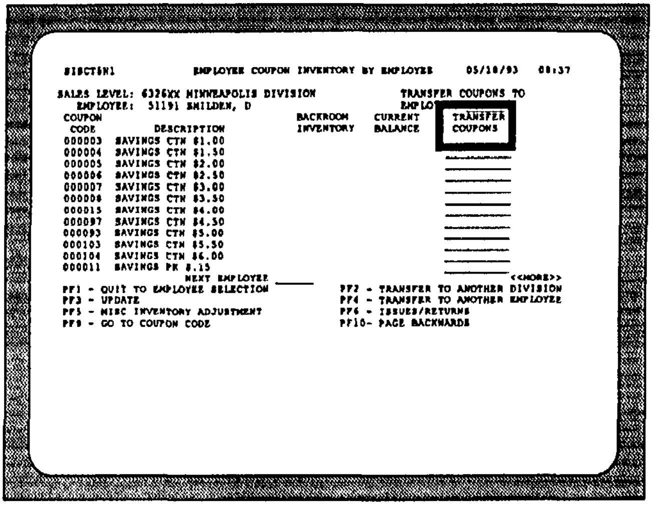
Name/Div/Dist #	Quantity	Description/Item #/T-code

RA#

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Transferring Coupons to Another Employee

1. With the Employee Coupon Inventory by Employee screen displayed, press [PF4] to obtain the TRANSFER COUPONS column.



51846 6915

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The system will prompt you for the employee number of the employee you wish to transfer coupons to. Enter the number of coupons to be transferred by coupon. You do not have to enter a minus (-) sign.

3. When you have finished your entries, press [PF3] to update. A message will be displayed indicating that the record was updated. The employee's current balance will be decreased and the recipient employee's balance will automatically be increased.

51846 6916

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6917

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6918

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Reconciling Coupon Inventories

I. On a monthly basis, retrieve Coupon Management Detail report from the Print Report menu of SIS. Refer to chapter 4 of this Book for instructions.

II. Compare the systems balance of the backroom inventory to what is actually in the backroom. Remember, no coupons are ordered to the backroom. However, from time to time, coupons may be returned or ordered in extreme cases, etc. This must be that starting point for any auditing procedure.

III. *Research any discrepancies such as:*

- returns to Winston-Salem reported via system
- issuances not recorded in system
- data error entry

IV. Retrieve the coupon type and order number from the shipping tickets on file.

V. Match the shipping tickets received during the month with entries in the Detail Report by order number, coupon type and employee. This matching process should uncover gaps, additions, etc. in CMS, if any exist.

VI. Once reconciliation is complete, dispose of shipping ticket, order review screen printout and verification.

51846 6919

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Returning Active Coupons to W-S

I. When returning unused/excess inventories of active coupons, the following procedures will be used:

- Only full rolls of active (unexpired) coupons may be returned.
- Sales reps will count the number of rolls/SKUs by item number and fill out the "coupon returns" portion of the Coupon Requisition form.
- With this information at hand, the sales reps will then call Promotion Coordinator, provide information and Coordinator will provide to the sales rep a return authorization (RA) number. This RA number must be included with returned coupon shipment.
- If necessary to expedite this process, the Coordinator will obtain a bulk list of RA numbers to utilize for reps. Contact Bonnie Chappell at (919) 767-9230.
- Sales reps must place RA number on form and on the shipping address label. A copy of this form should be included with the coupons and a copy sent to the Promotion Coordinator for adjustment in the CMS system.
- The shipment should be sent "freight collect" to the following address:

  R.J. Reynolds Tobacco Company
  c/o Lentz Warehousing and Distribution
  5900 Grassy Creek Blvd
  Winston-Salem, NC 27105

- Coordinator utilizes form to update CMS appropriately.

Returning Obsolete Coupons to W-S

II. When returning unused obsolete coupons (expired dates, etc.) utilize the following procedure:

- Partial coupon rolls may be returned. An RA is not needed to return expired coupons.
- Again, sales reps will count the number of rolls/SKUs by item number and fill out the "coupon returns" portion of the Coupon Requisition form. It is not necessary to include an RA number to return obsolete coupons.
- Include a copy of the coupon return form in the shipment and send a copy to the Promotion Coordinator for adjustment in the CMS system.
- Send shipment "freight collect" to the following address:

  R.J. Reynolds Tobacco Company
  c/o Lentz Warehousing and Distribution
  5900 Grassy Creek Blvd
  Winston-Salem, NC 27105

51846 6920

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Attn: Katie Young - For Counting and Disposal

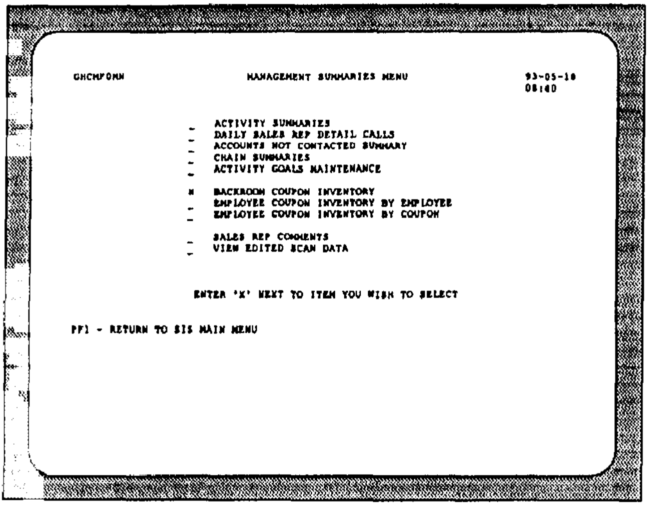
- Coordinator updates return via the CMS system

III. *Coupons which have been removed from product at retail should be destroyed by sales rep and reported appropriately via handheld computer by sales reps. Ensure that this is accomplished on a consistent basis.*

Returning Coupons Via CMS

Whether returning active or obsolete coupons, the SC must update CMS upon notification. To do so:

1. *With the SIS Main Menu displayed, place an "X" beside "Management Summaries" and press [ENTER]. The following screen will be displayed. Place an "X" beside BACKROOM COUPON INVENTORY and press [ENTER].*

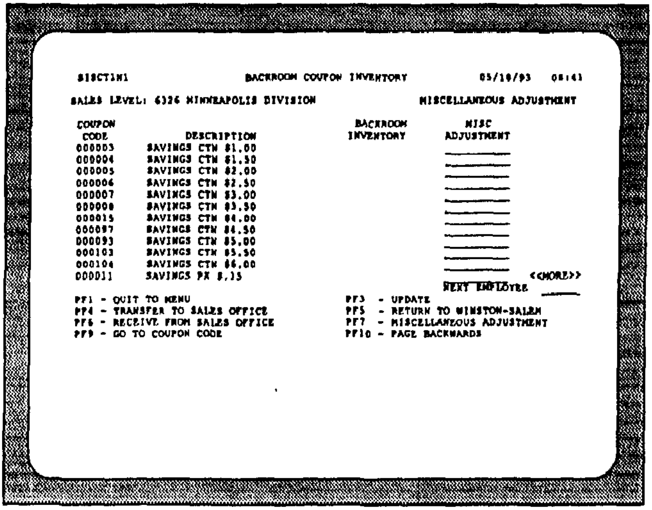


51846 6921

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. An instructional screen will be displayed. Press [ENTER] to display the following screen.



SISCTIN1 BACKROOM COUPON INVENTORY 05/10/93 08:41

SALES LEVEL: 6326 MINNEAPOLIS DIVISION MISCELLANEOUS ADJUSTMENT

COUPON CODE	DESCRIPTION	BACKROOM INVENTORY	MISC ADJUSTMENT
000003	SAVINGS CTN $1.00		______
000004	SAVINGS CTN $1.50		______
000005	SAVINGS CTN $2.00		______
000006	SAVINGS CTN $2.50		______
000007	SAVINGS CTN $3.00		______
000008	SAVINGS CTN $3.50		______
000015	SAVINGS CTN $4.00		______
000097	SAVINGS CTN $4.50		______
000093	SAVINGS CTN $5.00		______
000103	SAVINGS CTN $5.50		______
000104	SAVINGS CTN $6.00		______
000011	SAVINGS PK $.15		______

<<MORE>>

NEXT EMPLOYEE ______

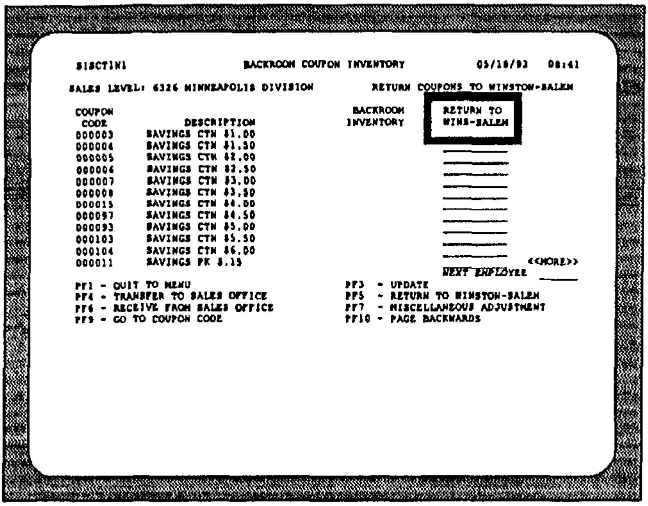
PF1 - QUIT TO MENU
PF3 - UPDATE
PF4 - TRANSFER TO SALES OFFICE
PF5 - RETURN TO WINSTON-SALEM
PF6 - RECEIVE FROM SALES OFFICE
PF7 - MISCELLANEOUS ADJUSTMENT
PF9 - GO TO COUPON CODE
PF10 - PAGE BACKWARDS

51846 6922

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. Press [PF5]. The column will change to RETURN TO WINS-SALEM. Enter the number of coupons to transfer for each coupon code and press [PF3] to update the system with your changes.



© R.J. Reynolds Tobacco Company 1993

51846 6923

CMS Reports

There are three reports available from the SIS Menu. These reports provide the ability to view details, to summarize data and to reconcile inventory. The reports can be customized by entering parameters on the report request screen. As with the activity summary, Sales Areas and Regions can get information on their Divisions by entering the appropriate number of "x's" in the sales level designation. For example, the designation to list all SASA Divisions would be "2XXX" and the designation to list all Division in the Winston-Salem Region would be "21XX." Each Division will be listed separately.

Report Description and Request Parameters

- **COUPON MANAGEMENT ACTIVITY DETAILS** which is used to view details by either (1) backroom or (2) employee for a range of dates specified in MM/DD/YY format. If you want the employee detail for one particular employee only, enter the employee's number in the requested field. If you want to report on all employees, leave this field blank. If you want to print all coupon balances even if there is no activity (issuances, placements, etc.) for the coupon during the date range, enter YES in the INCLUDE BALANCES field. Specify the desired number of copies. This report can be used to assist with physical inventory reconciliations because it details all *transactions since the last inventory (specific dates can be specified).*

- **COUPON MANAGEMENT INVENTORY REPORT** shows the current balance of backroom or employee coupon inventory. No activity is shown on this report. This report can be printed at anytime to show an employee what their current inventory balance is.

- **INTER-DIVISION TRANSFER REPORT** shows all "incoming" transfers awaiting receipt and transfers accepted into your Division inventory. It will not list the transfers you have made to another Division. The transfers made to another Division can be obtained on the Activity Detail Report.

- **COUPON PLACEMENT AND INVENTORY RECONCILIATION** shows the total number of coupons (by type) that were placed before the "inventory date" but not communicated until after the "inventory date". These placements were not reflected in CMS at the time of the inventory. Any "adjustments" to the balances in CMS from the physical inventory were misstated by these amounts. Therefore, you will need to "adjust" each employee's coupon inventory by the amount listed on the report.

Requesting Summary and Detail Reports

1. With the SIS Menu displayed, place an "X" beside Print Report and press [ENTER].
2. With the Print Report Menu displayed, place an "X" one of the following options:

   - Coupon Management Detail Report
   - Coupon Management Summary Report
3. The report request screen will be displayed. This screen will differ, depending on the report you selected.

51846 6924

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
SISCTKN1                   PRINT REQUEST                      03/16/93
                  COUPON MANAGEMENT ACTIVITY DETAILS          09:57

DATE RANGE   FROM: 03/09/93  TO: 03/16/93  (Format MM/DD/YY)
----------

             SALES-LEVEL      2326

             REPORT-TYPE      1       ( 1 - Backroom detail report)
                                      ( 2 - Employee detail report)

             EMPLOYEE         ______  (For detail of only one employee
                                       on the employee detail report.)

             LIST ALL COUPONS           (Y - Print all coupon balances
                         even if no 'activity' occurred
                         for coupon duringdate range.)

             DESTINATION      2326XX

             COPIES           1_

PF1 - RETURN TO MENU
```

4. Enter the parameters as described above and press [ENTER] to request the report.

51846 6925

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Requesting Reconciliation Reports

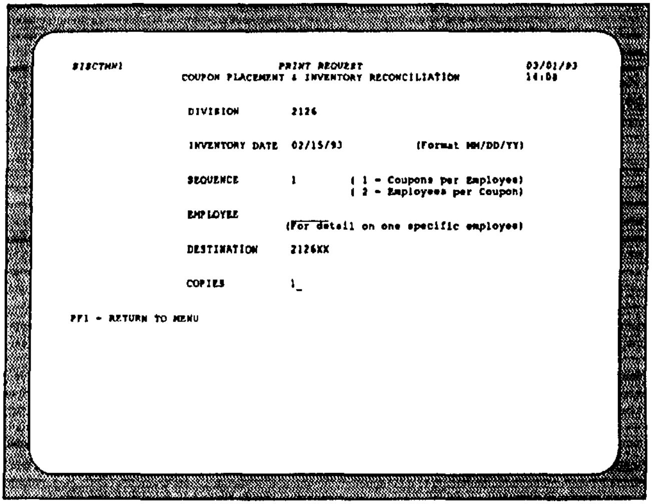
1. With the SIS Menu displayed, place an "X" beside Print Report and press [ENTER].

2. With the Print Report Menu displayed, place an "X" beside:

   - Coupon Placement & Inventory Reconciliation

3. The report request screen will be displayed.

4. If you want the employee detail for one particular employee only, enter the employee's number in the requested field. If you want to report on all employees, leave this field blank.



5. Enter the parameters as described above and press [ENTER] to request the report.

51846 6926

© R.J. Reynolds Tobacco Company 1993

DETAIL

Program: SISCTKR2
Database: PROD

R.J. REYNOLDS TOBACCO COMPANY
SIS COUPON MANAGEMENT

EMPLOYEE ACTIVITY DETAILS FOR THE PERIOD
February 15, 1993 THRU March 08, 1993

DIVISION: XXXX - DIVISION X
EMPLOYEE: 12345 WOOD, HOLLY

COUPON	COUPON DESCRIPTION	DATE	BEGINNING BALANCE	ISSUE/ (RETURN)	PLACEMENTS	TRANSFE
000093	SAVINGS CTN $5.00	02/15/93	0			
		02/15/93				
	* TOTAL COUPON 000093		0	0	0	
	UNPLACEMENTS:		0			
000012	SAVINGS PK $.20	02/15/93	0			
		02/15/93				
	* TOTAL COUPON 000012		0	0	0	
	UNPLACEMENTS:		0			
000013	SAVINGS PK $.25	02/15/93	0			
		02/15/93				
	* TOTAL COUPON 000093		0	0	0	
	UNPLACEMENTS:		1			
000014	SAVINGS PK $.30	02/15/93	0			
		02/15/93				
		02/19/93			(3,526)	
		02/22/93		3,000		
		02/22/93			(100)	
		02/23/93			(110)	
		02/23/93			(60)	
		02/24/93			(1,803)	
		02/24/93			(500)	
		02/24/93			(90)	
		03/04/93			(1,204)	
		03/04/93			(300)	
		03/04/93			(205)	
	* TOTAL COUPON 000093		0	3,000	7,898	
	UNPLACEMENTS:		0			

51846 6927

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

SUMMARY

Program: SISCTLR1 R.J. REYNOLDS TOBACCO COMPANY
Database: PROD SIS COUPON MANAGEMENT - BACKROOM COUPON INVENTORY

DIVISION: XXXX - DIVISION X

COUPON		INVENTORY
000003	SAVINGS CTN $1.00	13500
000004	SAVINGS CTN $1.50	22500
000005	SAVINGS CTN $2.00	59777
000006	SAVINGS CTN $2.50	25500
000007	SAVINGS CTN $3.00	122752
000008	SAVINGS CTN $3.50	36800
000015	SAVINGS CTN $4.00	18500
000012	SAVINGS PK $.20	2985
000013	SAVINGS PK $.25	25500
000014	SAVINGS PK $.30	5000
000016	SAVINGS CTN $.35	62500
000017	SAVINGS CTN $.40	34000
000028	FULL PRICE CTN $3.00	25000
000035	FULL PRICE CTN $4.00	3456
000095	FULL PRICE CTN $5.00	98765
000063	FULL PRICE 2 CTNS $9.00	1234
000087	FULL PRICE 2 CTNS $7.00	54321
000085	FULL PRICE 3 CTNS $11.00	7654
000037	FULL PRICE PK $.75	45323
000046	FULL PRICE PK $.30	6443
000047	FULL PRICE PK $.40	8876
000048	FULL PRICE PK $.50	9761
000049	FULL PRICE PK $.55	91857
000029	FULL PRICE 2 PKS $.75	11564
000031	FULL PRICE 2 PKS $1.25	11736
000050	FULL PRICE 2 PKS $1.00	121333
000051	FULL PRICE 2 PKS $1.50	9392
000040	FULL PRICE 2 PKS $2.00	62593
000091	SALEM $3/7/11 KIT OF 55	32192
000064	WINSTN $3/7/11 KIT OF 55	12865
000092	WINSTON WALMART KIT	101689
000061	MIL FULL PRICE CTN $2.00	22291
000062	MIL FULL PRICE CTN $3.00	4432
000079	MIL FULL PRICE CTN $4.00	2123
000084	MIL FULL PRICE CTN $1.00	221
000088	CONS MISSN SAV PK CPN	835
000089	CONS MISSN FP PK CPN	5925
000090	CONS MISSN FP CTN CPN	1875

************ END OF REPORT ************

51846 6928

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Program: SISCTMR2
Database: PROD

R.J. REYNOLDS TOBACCO COMPANY
SIS COUPON PLACEMENTS & INVENTORY RECONCILIATION

DIVISION: XXXX - DIVISION X

COUPON	EMPLOYEE	PLACEMENTS
000006 SAVINGS CTN $2.50	12345 H WOOD	7285
000007 SAVINGS CTN $3.00	12345 H WOOD	6731
000012 SAVINGS PK $.20	12345 H WOOD	500
000013 SAVINGS PK $.25	23456 F STEIN	500
000014 SAVINGS PK $.30	12345 H WOOD	6731
000028 FULL PRICE CTN $3.00	12345 H WOOD	7600
	23456 F STEIN	200
000050 FULL PRICE 2 PKS $1.00	12345 H WOOD	1200
	23456 F STEIN	7400
	34567 C BARR	700

Note: The 'inventory date' is the date on which the physical inventory count was done.

The purpose of this report is to show the coupons that were placed before the 'inventory date' but not communicated until on or after that date. These placements were not reflected in CMS at the time of the physical count.
Any adjustments to 'physical' will need to take the amounts shown above into consideration.

************* END OF REPORT ************

51846 6929

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Description	Coupon Code
SAVINGS CTN $1.00	000003
SAVINGS CTN $1.50	000004
SAVINGS CTN $2.00	000005
SAVINGS CTN $2.50	000006
SAVINGS CTN $3.00	000007
SAVINGS CTN $3.50	000008
SAVINGS CTN $4.00	000015
SAVINGS CTN $4.50	000097
SAVINGS CTN $5.00	000093
SAVINGS CTN $5.50	000103
SAVINGS CTN $6.00	000104
SAVINGS PK $.15	000011
SAVINGS PK $.20	000012
SAVINGS PK $.25	000013
SAVINGS PK $.30	000014
SAVINGS PK $.35	000016
SAVINGS PK $.40	000017
SAVINGS PK $.45	000096
SAVINGS PK $.50	000094
SAVINGS PK $.55	000105
SAVINGS PK $.60	000106
FULL PRICE CTN $1.00	000041
FULL PRICE CTN $1.50	000042
FULL PRICE CTN $2.00	000055
FULL PRICE CTN $2.50	000043
FULL PRICE CTN $3.00	000028
FULL PRICE CTN $4.00	000035
FULL PRICE CTN $5.00	000095
FULL PRICE 2 CTNS $7.00	000087
FULL PRICE 2 CTNS $9.00	000063
FULL PRICE 3 CTNS $11.00	000085
FULL PRICE PK $.30	000046
FULL PRICE PK $.40	000047
FULL PRICE PK $.50	000048
FULL PRICE PK $.55	000049
FULL PRICE PK $.75	000037
FULL PRICE 2 PKS $.75	000029
FULL PRICE 2 PKS $1.00	000050
FULL PRICE 2 PKS $1.25	000031
FULL PRICE 3 PKS $1.50	000051
FULL PRICE 5 PKS $2.00	000040
SALEM $3/7/11 KIT OF 55	000091
WINSTON $3/7/11 KIT OF 55	000064
WINSTON WALMART KIT	000092
MIL FULL PRICE CTN $1.00	000084
MIL FULL PRICE CTN $2.00	000061
MIL FULL PRICE CTN $3.00	000062
MIL FULL PRICE CTN $4.00	000079
CONS MISSN SAV PK CPN	000088
CONS MISSN FP PK CPN	000089
CONS MISSN FP CTN CPN	000090

51846 6930

© R.J. Reynolds Tobacco Company 1993

CHAPTER 9
Utilizing the Coupon Printer

51846 6931

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

UTILIZING THE COUPON PRINTER

Summary

The handheld/coupon printer is a technological breakthrough that will give RJR Sales Representatives and Part-timers the ability to print savings coupons in each account.

Hardware Components

The handheld/coupon printer units contain two separate pieces of hardware that communicate with each other to print coupons and report activities.

POQET COMPUTER

The Poqet Computer that will be used during the pilot contains a full screen display, keyboard, connector for communicating with the printer and the modem, batteries, on/off switch and memory cards.

The keys to be used on the hand-held computer for printing coupons and reporting activities are described below:

- **ARROW KEYS** - located on the bottom right hand side of the keyboard. There are fours arrow keys that allow you to move the cursor left, right, up and down.
  - LEFT ARROW KEY located directly to the right of the space bar allows you to move the cursor to the left.
  - UP ARROW KEY located one key to the right of the left arrow key allows you to move the cursor up.
  - DOWN ARROW KEY located one key to the right of the up arrow key allows you to move the cursor down.
  - RIGHT ARROW KEY located one key to the right of the down arrow key allows you to move the cursor to the right.
- **BLUE P (POQET) KEY** located directly to the left of the space bar key allows additional PC functions to be performed when it is pressed in combination with other keys:
  - P (POQET) KEY/PAGE DOWN - Moves to the next page.
  - P (POQET) KEY/PAGE UP - Moves to the previous page
  - P (POQET) KEY/HOME - Moves to the beginning of the list
  - P (POQET) KEY/END - Moves to the end of the list
- **ENTER KEY** - accepts the letter or number entered beside each description on the screen and moves the cursor to the next description for entry.
- **NUMBER KEYS** - located across the top of the keyboard allow you to enter numbers beside the descriptions.
- **FUNCTION KEYS** - located directly above the number keys are designated F1, F2, etc. They perform special computer-related tasks when pressed.

51846 6932

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- ◆ **IMPORTANT** - By pressing the F1 function key you can access help screens which contain valuable information to help you use the hand-held/coupon printer.

- **BACKSPACE KEY** - Located directly above the ENTER key allows you to backspace and erase numbers entered beside a description.

- **ESC KEY** - Moves to previous function screen.

- **P (POQET) KEY/F6** - By holding the Poqet key down and then pressing the F6 key, the screen contrast can be changed.

- **P (POQET) KEY/F7** - By holding the Poqet key down and then pressing F7 key, the screen contrast can be changed.

The keys described above are the only keys that will be used when using the Handheld/Coupon Printer.

Coupon Printer

The printer unit contains two round spools, one for coupons and the other for VPRs. The unit also contains a battery, printer, and connector for communicating with the handheld.

Operating Procedures

To prepare the Handheld/Coupon Printer for use, release the handheld tray with a firm tug on the top edge and lay the tray down gently. Open the handheld unit by pressing the button located in the center of the handheld while lifting up. Turn the handheld unit on by pressing the I/O key located on the right hand side of the keyboard. Look at the screen on the hend-held computer.

a. If your screen has an A:\ displayed, type RJRT and press [ENTER]. Continue to step B.

b. If your screen has two boxes displayed with the first box titled RJR Sales Information System, continue to the ACCOUNT SELECTION step.

c. If options A and B did not apply, please call the Fastech Help Desk at 1-800-227-4242.

Phase 2 Software Overview

All activity reporting and requests for coupon printing will be recorded in the handheld computer by account. At the end of each day, the handheld computer will be connected to a modem for communicating all of your activity to the Winston-Salem host computer. Detailed instructions follow for using the new account reporting and communication software.

The new software also allows you to print coupons when a call is not not being made. To do this, select PRINT COUPONS from the main menu and follow the instructions in this document. The coupons you print via this method will not be recorded.

51846 6933

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Account Selection

The first step is to locate the account you are calling on in the handheld computer. At the main menu screen use the up/down arrows to select Account Reporting and press [ENTER].

There are five methods available for locating an account. The selection method instructions are detailed for each selection. Use the up/down arrows to choose your account selection method and press [ENTER].

- SELECT BY ROUTE NUMBER - Displays accounts in route number sequence. Use the arrow keys to select an account or type a route number to reposition the cursor to the selected route number. After the correct account is highlighted, press [ENTER].
- SELECT BY ACCOUNT NUMBER - Displays accounts in SIS account number sequence. Use the arrow keys to select an account or type in the SIS account number to reposition the cursor to the selected account number and press [ENTER].
- SELECT BY NAME - Displays accounts in alphabetical order by name. Use the arrow keys to select an account or type in the name to reposition the cursor to the selected name and press [ENTER].
- SELECT GENERIC - Allows you to make a call for an account that has not been assigned an SIS account number. This is primarily used for new accounts. Type in the name of the account and press [ENTER].
- SELECT OUT OF TERRITORY - Allows you to make a call on an account that is not assigned to your territory. Type in the store name and account number and press [ENTER].

Additional keys are available for scrolling through the account list. They are as follows:

- Up arrow - up one line
- Down arrow - down one line
- Blue P (Poqet) key/page down - next page
- Blue P (Poqet) key/page up - previous page
- Blue P (Poqet) key/Home - top scroll list
- Blue P (Poqet) key/End - bottom of scroll list

The Store Activity screen now displayed allows you to verify the account selected by reviewing the information on the top of the screen. If the information is incorrect, return to the Account Selection screen by pressing [ESC] and reselect an account. If the correct account is displayed, use the arrow keys to select START CALL and press [ENTER].

The Call Procedures screen now displayed provides you with 6 account reporting sections. The following details the use of the each section.

Print Coupons

Prepare the Coupon Printer for printing by following these steps:

1. Turn the Coupon Printer on by pressing the 1 side of the switch which is located on the top of the printer. The red light on the printer will blink one time when the printer has been turned on.

2. Load the blank roll of coupons into the printer unit as follows:

   a. Pull the blank spool cover off of the large print spool located on the right hand side of the printer unit.

   b. Place the blank coupon roll on the spool. The loose end of the roll should feed underneath the spool and towards the left side of the coupon printer.

   c. Twist the FEEDER knob (located just below the on/off switch), counter clockwise to open the printer mechanism. Twist the knob until it stops.

   d. Load the coupon roll into the printer by holding the loose end of the coupon roll with your left hand while guiding the coupon roll into the printer unit with your right hand until the coupons touch the inside edge of the printer. Allow one coupon to be visible on the left side of the machine where the printer coupons are dispersed.

   e. Twist the FEEDER knob (referenced in step c) clockwise to close the printer mechanism back to its original position.

   f. Place the black spool cover back on the large print spool located on the right hand side of the printer unit.

   g. Press the form feed button which is the black button beside the red light located on top of the printer. This will advance the coupon roll one form and align the coupon with the printer.

   h. You are now ready to print coupons!!

Use the arrow keys to select PRINT COUPONS and press [ENTER]. The computer will generate a list of the authorized Doral, Magna and Sterling coupon values. You may scroll through other coupon denominations by using the keys described above. Select the type of coupon you want to print and type in the number needed. **Multiple coupons denominations may be printed during one request.**

When all quantities have been entered for all coupon values, press [F10] to print. The computer will prompt you for your security code. Type 7121 and press [ENTER].

After a short pause, a new window named PRINT PROGRESS will appear with a message that gives you the coupon description and number left to print inside the window. The coupon printer should begin printing coupons and a counter of

51846 6935

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

the coupons left to print will be displayed. All denominations requested will be printed with a VOID coupon separating the coupon denominations.

When the printer is printing, you may interrupt the printing by pressing any key on the handheld computer. In this event, the message ABORT PRINT Y/N? will appear. To resume printing, press the N key followed by the [ENTER] key. To terminate printing, press Y followed by [ENTER].

If the printer runs out of coupons during printing, please follow the RELOADING instructions described later in this document.

When all coupons have been printed, the PRINT PROCESS window leaves and you are ready to make your next coupon printing request by repeating all of the instructions listed above.

All coupons printed are automatically recorded for placement into the handheld computer. Placement adjustments may be made by following the REPORT COUPONS/PREMIUMS instructions described later in this document.

Press [ESC] to return to the Call Procedures screen.

- IMPORTANT: When all coupons have finished printing turn the COUPON PRINTER OFF *by pressing the 0 side of the switch which is located on top of* the printer.

Report Displays

Use the arrow keys to select REPORT DISPLAYS and press [ENTER]. The computer will generate a list of all authorized DISPLAYS and VPRs. You may scroll through other display denominations by using the keys described above.

Select the displays and VPRs that you want to report and type in the amount placed and press [ENTER]. A box will appear on the screen for selecting the type of payment. Select the payment type with the arrow keys and press [ENTER].

You may also type an "R" for a refused display in the amount placed column. A box will appear on the screen for selecting the type of refusal. Select the refusal type with arrow keys and press [ENTER].

- *Note:* Headquarter Payment and Draft Amounts are calculated and displayed across the bottom of the screen. When displays have been recorded with draft payments, you must review the Payment Verification/Draft Number section described later in this document before ending this call.

Press [ESC] to return to the Call Procedures screen.

Report Coupons/ Premiums

Use the arrow keys to select REPORT COUPONS/PREMIUMS and press [ENTER]. The computer will generate a list of all authorized COUPONS and PREMIUMS. You may scroll through other coupon/premium denominations by using the keys described above.

51846 6936

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Select the premium/coupon that you want to report and type in the number placed. Notice that any coupons already printed have the number printed in the placed column. Any placement adjustments should be made by retyping the number actually placed.

Press [ESC] to return to the Call Procedures screen.

Report POS

Use the arrow keys to select REPORT POS and press [ENTER]. Use the arrow keys to scroll the different types of POS and type the number placed.

Press [ESC] to return to the Call Procedures screen.

Payment Verification/Draft Procedures

Use the arrow keys to select PAY VERIFICATION/DRAFT PROCEDURES and press [ENTER]. All the DISPLAYS and VPRS that you previously recorded will appear on this screen. Verify that the information is correct. You may return to the REPORT DISPLAYS selection for correcting any errors. If a draft needs to be written, a cursor will appear in the lower right hand corner. Type in a valid draft number and press [ENTER].

Press [ESC] to return to the Call Procedures screen.

End Call

Use the arrow keys to select END CALL and press [ENTER]. If a draft needs to be written and you have not recorded the proper information, a message will appear prompting you to go to the PAYMENT VERIFICATION/DRAFT PROCEDURES screen. If the draft information has been recorded properly, the END CALL will return to the ACCOUNT ACTIVITY Screen. Select START CALL to re-enter the current account selected or RETURN TO ACCOUNT SELECTION for selecting a new account for activity.

Communication

Communication allows the information in your handheld unit to be transferred via the telephone lines to the Winston-Salem host computer for management reporting. The following instructions detail the steps for communicating your hand-held information successfully.

Modem Hookup

Release the handheld unit from the coupon printer by applying slight upward pressure on the back edge of the handheld unit. The unit should disconnect from the handheld tray. The handheld unit must be disconnected from the handheld tray before communicating.

Prepare the Modem for use by following these steps:

1. Connect the black power cord into the back middle section of the modem and then plug the large end into an electrical outlet.
2. Plug the telephone cord received with the modem into the right most phone connection of the modem. The correct phone connection is marked TO JACK on the area just above the connection. Plug the other end of the telephone cord into a telephone outlet.

51846 6937

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. **OPTIONAL:** The other telephone line connection in the modem may be used with your telephone. When the modem is not in use, any incoming calls will pass through the modem and calls can be received normally.

4. Plug the male end of the ribbon cable into the left rear side of the modem and plug the remaining end into the Poqet computer connection located on the rear side of the Poqet computer adapter. Be sure that the 2 buttons on the front of the modem are out. If needed, press the buttons to change their position.

5. The Poquet computer and modem are now prepared for communication.

WARNING: DUE TO HEAT GENERATED BY THE MODEM, DO NOT SET THE COMPUTER ON TOP OF THE MODEM DURING COMMUNICATIONS AND UNPLUG THE MODEM WHEN COMMUNICATIONS ARE COMPLETE.

Daily Communication

1. Follow the steps listed above for connecting the Poqet Computer and modem.

2. Make sure the modem is connected to an electrical outlet and receiving power by noticing the green lights lit on the front of the modem.

3. Turn on the Poqet computer by pressing 1/0 switch. The screen should display the main menu screen with Account Reporting and Communication as the two available options for selection. If this screen does not appear, follow the instructions in the Operating Procedures section to return to this screen.

4. Use the up/down arrows to choose COMMUNICATION and press [ENTER].

5. The CHANGE TERRITORY/EMPLOYEE NUMBER screen allows you to change the current territory and/or employee number. If the territory number is changed, all activities will be reported for the current territory and then the new territory accounts will be loaded into the Poqet computer for future activity. If the employee number is changed, the activities will be posted to the employee number just entered. Change the territory and/or employee number by overtyping the current information. When all changes have been made, press [F10] to continue.

6. A message will appear on the next screen that prompts you to connect the Poqet computer with the modem as instructed above. When you are finished, press [F10] to continue.

7. The phone number screen will appear that allows you to change the phone number for communication. The phone number is 1-800-352-2888. If the phone number is correct in the computer, no entry is necessary. Press [F10] to continue.

8. Different communication display windows will appear now. Your Poqet computer should communicate automatically from this screen and when

51846 6938

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

complete, return to the main menu. If your Poqet computer remains on this screen for more than 2 hours, please contact the Fastech Help Desk at 1-800-227-4242 for assistance.

Coupon Printer

Loading

a. Pull the black spool cover off the large print spool located on the right hand side of the printer unit.

b. Place the blank coupon roll on the spool. The loose end of the roll should feed underneath the spool and towards the left side of the coupon printer.

c. Twist the FEEDER knob (located just below the on/off switch), counter clockwise to open the printer mechanism. Twist the knob until it stops.

d. Load the coupon roll into the printer by holding the loose end of the coupon roll with your left hand while guiding the coupon roll into the printer unit with your right hand until the coupons touch the inside edge of the printer. Allow one coupon to be visible on the left side of the machine where the printer coupons are dispersed.

e. Twist the FEEDER knob (referenced in step c) clockwise to close the printer mechanism back to its original position.

f. Place the black spool cover back on the large printer spool located on the right hand side of the printer unit.

g. Press the form feed button which is the black button beside the red light located on top of the printer. This will advance the coupon roll one form and align the coupon with the printer.

h. You are now ready to print coupons!!

Reloading

a. Pull the black spool cover off the large print spool located on the right hand side of the printer unit.

b. Twist the FEEDER knob (located just below the on/off switch), counter clockwise to open the printer mechanism. Twist the knob until it stops.

c. Pull the used roll off the large print spool and any loose coupons out of the printer mechanism.

d. Load a new coupon roll into the printer by holding the loose end of the coupon roll with your left hand while guiding the coupon roll into the printer using with your right hand until the coupons touch the inside edge of the printer. Allow one coupon to be visible on the left side of the machine where the printed coupons are dispersed.

51846 6939

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

e. Twist the FEEDER knob clockwise to close the printer mechanism back to its original position.

f. Place the black spool cover back on the large print spool located on the right hand side of the printer unit.

g. Press the form feed button which is the black button beside the red light located on top of the printer. The coupon roll will not advance.

h. Press any key on the handheld keyboard to continue printing.

Battery Maintenance

The battery in the coupon printer unit may be recharged by using one of the following methods:

1. Remove the battery from the coupon printer by pressing out on the two bottom latches located on each side the battery and pull the battery out. Unplug the battery from the coupon printer by pulling the plastic connectors apart on the black/red battery wires. Plug the plastic battery charger connector to the battery and plug the large adapter into any AC outlet in your home. Reinsert the battery into the coupon printer by connecting the plastic connector and sliding the battery back into the battery slot. The latches should snap shut around the battery when installed properly.
2. Plug the plastic battery charger into the adapter hole located on top of the printer unit and plug the large adapter into any AC outlet in your home. Complete battery charge takes 14 hours.

Replacing the Batteries in the Handheld Unit

1. Turn the computer off by pressing the I/O key.
2. Locate the area between the keyboard and the screen that has blue words and symbols. The plastic area that has the word MENU on one end and a bell shape at the other end contains the batteries.
3. Place your thumbs on the small tabs protruding from this area and lift up. This area should snap off exposing two AA batteries.
4. Replace the AA batteries with two Alkaline AA batteries noting the correct direction when placing batteries back into the unit. **You have 90 seconds to place the new batteries after the old ones have been removed.**
5. Replace the plastic cover by placing the back edge in to the unit while applying downward pressure on the front edge until it snaps back into place.
6. Turn the computer on by pressing the I/O key. Batteries should be replaced once every week.

51846 6940

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Cleaning the Print Head

1. Twist the FEEDER knob (located just below the on/off switch) counterclockwise to open the printer mechanism. Twist the knob until it stops.
2. Take a cotton swab and dip into a bottle of alcohol.
3. Lightly rub the cotton swab back and forth across the printer head approximately 10 times. The printer head is located along the leading edge (gold area) of the area lifted with the FEEDER knob.
4. Twist the FEEDER knob clockwise to close the printer mechanism back to its original position.

Disconnecting the Handheld Unit from the Handheld Tray

1. While holding the handheld, apply slight upward pressure on the back edge of the handheld unit. The unit should disconnect from the handheld tray.

Connecting the Handheld Unit to the Handheld Tray

1. Place the tab located on the front bottom edge of the handheld unit into the slot on the tray and press the back of the unit down until it snaps into place. The unit should not rest secure on the handheld tray.

Memory Card Trays

The handheld unit contains two memory card trays located on the lower side of each end of the handheld computer. This handheld will not function if the card is removed or the tray is not placed in the proper position. It is recommended that the Memory Card Trays not be tampered with to ensure smooth operation of your Coupon Printer/Handheld Unit.

Troubleshooting

The following represent items to check when you have a problem. Again, do not hesitate to call the Fastech Help Desk at 1-800-227-4242.

- If the handheld shuts off automatically, press the I/O key to turn the unit back on.
- If you receive a message BATTERY TOO LOW TO CONTINUE switch to the second coupon printer battery. If one is not available, you cannot continue to print.
- If you receive a message HANDSHAKE ERROR or INVALID STATUS, press [ENTER] on the handheld to clear the error message and switch the printer off for 10 seconds and then turn it back on. This should correct the problem.
- If the coupon printer jams while printing, reload the coupon printer using the RELOAD instructions above.

Help Desk Support

If you encounter a problem with the handheld/coupon printer that you cannot correct, please contact the Fastech Help Desk at 1-800-227-4242. They will be happy to help you correct the problem.

51846 6941

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK III: MATERIALS COORDINATOR

51846 6942

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK III

MATERIALS COORDINATOR
PROCEDURES

© R.J. Reynolds Tobacco Company 1993

51846 6943

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK III:
MATERIALS COORDINATOR

The Materials Coordinator (MC) is charged with administering all activities associated with fixture installation, Operations Unit warehouse maintenance, and supervision of General Sales Workers who install merchandising. As the ultimate source in the department, the MC serves a strictly organizational, administrative, and supervisory role in the Operations Unit office — the MC's time should not be spent on the street, but rather in the Office in the coordination of the department.

The MC also maintains office supplies, oversees the handheld computers, and is responsible for Vehicle Administration, as well as non-Workplan PDS/PDI.

CHAPTER 1: PRELIMINERY SMS FUNCTION OVERVIEW............1-1

Summary.......... 1-1

Function 402 - Order Entry.......... 1-1

Procedures.......... 1-1

Summary of Process.......... 1-3

Category Order.......... 1-5

Forms/Items Order.......... 1-14

Promotion Order.......... 1-17

Copy Existing Order.......... 1-21

Function 404 - Order Inquiry or Retrieval.......... 1-21

Procedures.......... 1-21

Summary of Process.......... 1-24

Examples: Specifying Inquiries and Options.......... 1-28

Modifying or Canceling an Order.......... 1-35

Function 405 - List of Materials.......... 1-37

Function 406 - Order/Item Inquiry #2.......... 1-41

Function 508 - Allocation Search by Item.......... 1-42

Function 509 - Allocation Transfer.......... 1-43

Function 524 - Allocation Report by Sales Level.......... 1-44

51846 6944

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 2: ORDER/MONITOR FIXTURES.......................... 2-1
Preliminary Notes.......................... 2-1
Procedures.......................... 2-1
CHAPTER 3: MANAGING BACKROOM INVENTORIES.......................... 3-1
Summary.......................... 3-1
Shipping Guidelines (Incoming/Outgoing).......................... 3-1
Troubleshooting Shipment Problems.......................... 3-5
CHAPTER 4: SCHEDULING INSTALLATIONS.......................... 4-1
Preliminary Activities.......................... 4-1
Procedures.......................... 4-1
Tracking Installation Efficiency.......................... 4-1
Procedures.......................... 4-2
CHAPTER 5: FIELD SUPPLY REQUESTS.......................... 5-1
Summary.......................... 5-1
Procedures.......................... 5-1
CHAPTER 6: MANAGING FIXTURE REFURBISHING.......................... 6-1
Summary.......................... 6-1
Procedures.......................... 6-1
CHAPTER 7: SUPERVISING GENERAL SALES WORKERS.......................... 7-1
Summary.......................... 7-1
Supervision of Outside Merchandising Specialists.......................... 7-1
Supervision of Backroom Personnel.......................... 7-1
CHAPTER 8: OFFICE SUPPLIES AND HANDHELD COMPUTERS.......................... 8-1
Maintaining Office Supplies.......................... 8-1
Tracking Handheld Computers.......................... 8-1
Problems With Handheld Component Parts.......................... 8-1

51846 6945

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 9: VEHICLE ADMINISTRATION........................ 9-1
Summary.. 9-1
Inquiry by Division.. 9-1
Inquiry by Vehicle.. 9-5
Inquiry by Status Code.. 9-6
Status Code Definitions.. 9-6
Changing Vehicle Assignment.. 9-7
New Vehicle (Prespec) Description.. 9-9
Printing Prespec Vehicle Descriptions.. 9-12
Requisitioning a Vehicle.. 9-12
Entering a Requisition.. 9-13
Canceling a Requisition.. 9-14
Changing a Requisition.. 9-15
Requisition Inquiry.. 9-17
Printing a Requisition.. 9-17
Assigning Driver to New Vehicle.. 9-18
Special Accessories.. 9-20
Adding a Note.. 9-20
Note Inquiry.. 9-21
Automobile Accident Procedures.. 9-22
Reporting an Accident.. 9-22
Repair Instructions.. 9-24
Insurance Cards.. 9-24
Summons, Subpoena.. 9-25
Employee Agreement.. 9-25
Registration and Title.. 9-25
Renewing License for Leased Vehicles.. 9-25

51846 6946

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Transferring Vehicles.. 9-26

Disposal of Company Vehicles.................................... 9-26

Unpurchased Vehicles.. 9-26

Employee/Third-party Purchase.............................. 9-26

Surplus.. 9-27

Glass Breakage.. 9-27

Alarm Repair.. 9-27

Job Codes.. 9-27

Fleet Operations Contacts.................................... 9-27

Biweekly Expense Report for New Vehicle.................. 9-27

51846 6947

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6948

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PRELIMINARY SMS FUNCTION OVERVIEW

Summary

Before the Materials Coordinator (MC) can begin to run the department, a thorough understanding of commonly used SMS functions is necessary. The following sections highlight the steps required to successfully complete each operation.

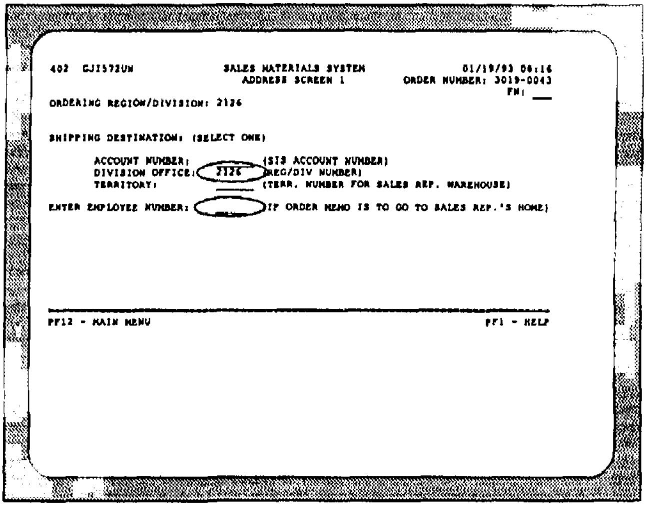
Function 402 - Order Entry

This function is used to place an order for any item or fixtures with component part numbers or diagram numbers.

- Modular Book Order - Order items with diagram numbers, ESS, etc.
- Category Order - Order items by category
- Form/Items Order - Order by item number

Procedures

1. Log on to SMS and invoke function 402, Order Entry. The following screen is displayed.



2. Enter the appropriate information and press [ENTER]. For demonstration purposes we have entered a Division of 2126. Enter employee number to send memo to SR's home.

3. The order entry ship-to screen will be displayed.

51846 6949

© R.J. Reynolds Tobacco Company 1993

```
402  GJ1572UN                 SALES MATERIALS SYSTEM             02/23/93 10:03
                                 ADDRESS SCREEN 2        ORDER NUMBER: 3054-0977
                                                                           FN: __
ORDERING OFFICE: 2126
****************************************************************************
SHIP TO:  ACCOUNT NUMBER:
          DIVISION OFFICE:  2126
          TERRITORY:
****************************************************************************
SHIP TO ADDRESS:  F. J. ARMSTRONG, JR.
                  8100 NORTH POINT BLVD
                  SUITE B
                  WINSTON-SALEM NC 27105


SALES REP. NUMBER:                 SALES REP.:


----------------------------------------------------------------------------
ENTER - CONTINUE WITH ORDER
PF3   - RETURN TO PREVIOUS SCREEN
PF12  - MAIN MENU                                                   PF1 - HELP
```

4. Verify this information is correct.

5. Press [ENTER] to continue. The order type selection screen will be displayed.

```
402  GJ1573UN                 SALES MATERIALS SYSTEM             01/19/93 08:20
                                ORDER ENTRY SELECT       ORDER NUMBER: 3019-0036
                                                                          FN: ___

                          Select one type of order entry:

                                _ CATEGORY ORDER

                                _ FORM/ITEMS ORDER

                                _ MODULAR BOOK ORDER

                                _ PROMOTION ORDER

                                _ COPY EXISTING ORDER

   OPTIONAL FUTURE DELIVERY - WEEK OF: ______ (YYMMDD format)

----------------------------------------------------------------------------
PF3  - RETURN TO PREVIOUS SCREEN
PF12 - MAIN MENU                                                    PF1 - HELP
```

51846 6950

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PRELIMINARY SMS FUNCTION OVERVIEW

6. Select the type of order you wish to create:

- CATEGORY ORDER - Use this option when you wish to select the items to be ordered by category (such as Permanent POS, Premium, etc.).
- FORM/ITEMS ORDER - Use this option when you know the item number(s) you wish to order.
- MODULAR BOOK ORDER - Currently unavailable (future enhancement)
- PROMOTION ORDER - Use this option to order items for a promotion.
- COPY EXISTING ORDER - Use this option when the order you are creating is similar to an existing order, as some data entry can be omitted.

7. If you wish to enter an order for future delivery (instead of immediate delivery), enter the desired delivery date in the **WEEK OF** field. The date specified cannot be more than 210 days into the future and must be entered in YYMMDD format.

8. Press [ENTER] to continue.

9. The next section contains a summary of the process for using any of the order types. It is followed by detailed instructions for each order type.

Summary of Process

1. At the order type selection screen select the desired order type. If you wish to request a future delivery date, enter the desired date. The date cannot be more than 210 days into the future. It must be entered in YYMMDD format.

2. Press [enter] to continue.

- *If you have requested a Category order:*
  - The system will prompt you to select a major category . For each major category selected, you must select at least one intermediate and minor category. Up to 4 major categories can be selected; up to 6 intermediate categories can be selected for each major category; up to 20 minor categories can be selected for each intermediate category.
  - When category selections are complete, the system lists the associated items. Enter the desired quantity of each item and press [PF4].
- *If you have requested a Form/Items order:*
  - The system will prompt you to enter each item and the desired quantity. Enter the desired items/quantities and press [PF4].

51846 6951

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- *If you have requested a Promotion order:*
  - To view a specific type of promotion, position the cursor in the **TYPE** column and press [PF1] (HELP). Select the type of promotion you wish to view. (This step is optional.)
  - Select the promotion for which you wish to order items
  - The system will then list the items associated with the promotion. Enter quantities for the desired items and press [PF4].
- *If you are copying an existing order:*
  - The system will prompt you to enter the existing order number you wish to copy items and quantities from.
  - The system will then list the items/quantities associated with the specified order. (This screen is similar to Form/Items Order.) Enter/modify items/quantities for the new order you are creating and press [PF4].

3. The Order Review screen is displayed. You can modify the quantities on this screen but cannot add items. Press [PF4] to continue.
4. If all items requested are in inventory, the Order Completion screen is displayed. If all items are not in inventory the Inventory Exceptions screen is displayed.
5. From either screen you can request special handling.
6. When you are ready to process the order, press the appropriate PF key ([PF4] from the Order Completion screen; [PF4] or [PF5] from the Inventory Exceptions screen).

51846 6952

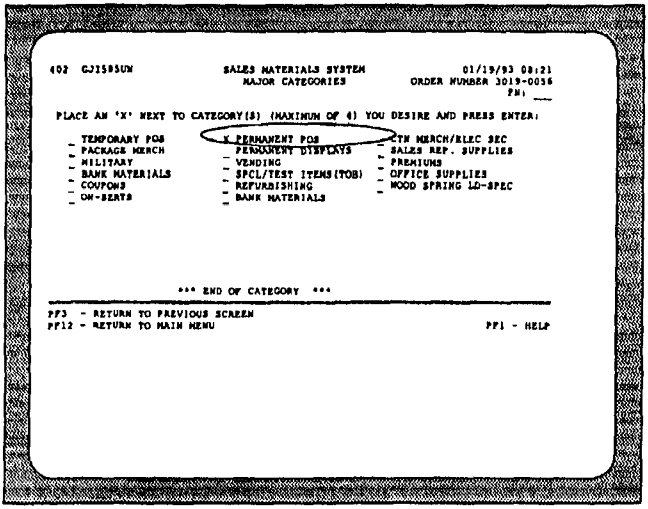
 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Category Order

Use this option when you want to select the items to be ordered by category, such as permanent POS items, premiums, coupons, etc.

1. When Category Order is selected, the Major Categories screen is displayed.



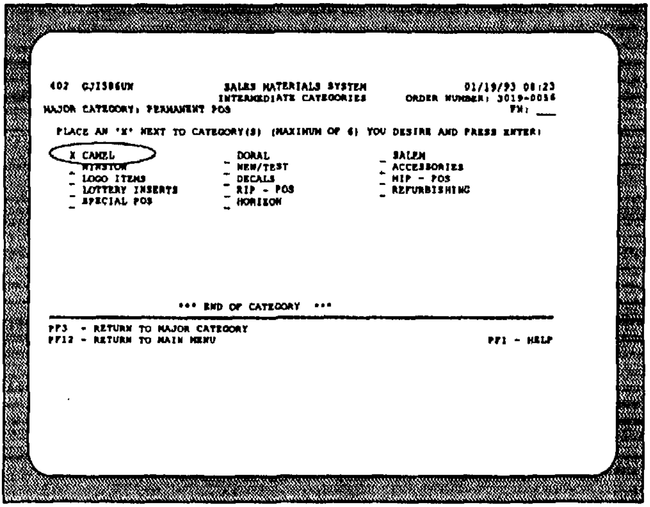
2. Enter X beside the categories you wish to select from. Up to 4 categories can be selected at one time.

3. Press [ENTER] to continue.

51846 6953

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The Intermediate Categories screen is displayed for the first major category selected.



5. Enter X beside the categories you wish to select from. As many as six categories can be selected at one time.

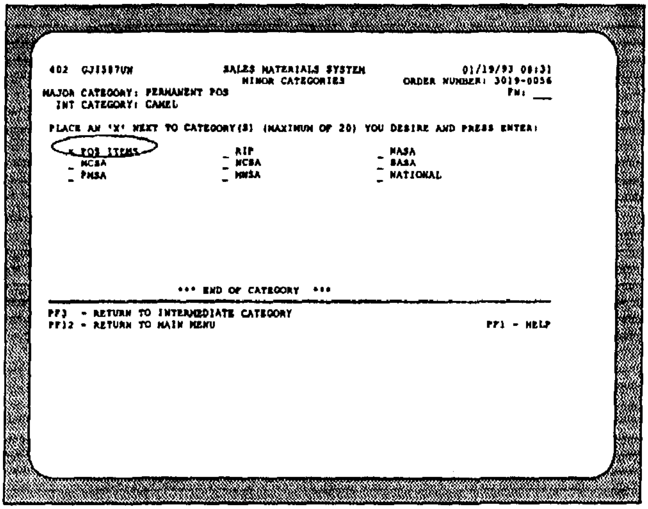
6. Press [ENTER] to continue. If multiple major categories were selected, intermediate categories for the next major category will be displayed. This process will continue until intermediate categories have been selected for each major category.

51846 6954

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. When intermediate categories have been selected for each major category, the Minor Categories screen is displayed. This screen lists minor categories for the first major/intermediate category combination.



8. Enter X beside the categories you wish to select from. As many as 20 categories can be selected at one time.

9. Press [ENTER] to continue. If multiple intermediate categories were selected or multiple major categories were selected, minor categories for the next intermediate category will be displayed. This process will continue until minor categories have been selected for each major/intermediate category combination.

51846 6955

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

10. When minor categories have been selected for all major/intermediate categories, the system will list the items associated with the category combinations requested. This list will begin with the first major/intermediate/minor category specified.

```
407  GJIS07U1             SALES MATERIALS SYSTEM            01/19/93 09:31
                           ITEM QUANTITY ENTRY         ORDER NUMBER: 3019-0056
MAJOR CATEGORY: PERMANENT POS
  INT CATEGORY: CANEL
MINOR CATEGORY: POS ITEMS                          MAXIMUM ORIGINAL  L   REMAIN
 SR                                                 ORDER    ALLOC   E    ALLOC
QTY    ITEM  ---DESCRIPTION----------  UNITS/SKU     QTY      QTY    V     QTY
       208353 CAMEL 3-D CIGARETTES SOL    10 BOX                0            0
____   208408 CAMEL BUSINESS HOURS OPE    10 BOX                0            0
____   390890 CAMEL BATTERY CLOCK          6 BOX               10    D      10
____   390920 CAMEL FLOOR ASHTRAY          2 BOX               10    D      10
____   390942 CAMEL LANE CLOSED           20 BOX               15    D      15
____   390964 CAMEL NEON                   1 BOX               15    D      15
____   391030 CAMEL PRICING BANNER 6'X    25 BOX                2    D       2
____   391063 CAMEL GROUND MOUNT           1 BOX               10    D      10
____   391074 CAMEL POLE MOUNT             1 BOX               22    D      22
____   391085 CAMEL CURB MOUNT             1 BOX                5    D       5
____
                   *** MORE DATA EXISTS ***
-----------------------------------------------------------------------------
PF3 - PREVIOUS SCREEN
PF4 - CONTINUE WITH ORDER                                  PF12 - MAIN MENU
PF7 - START OF DATA                                        PF1  - HELP
```

11. For each item, this screen indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).

12. Specify the quantity of each item you wish to order in the **QTY** field. If you do not want an item, leave the quantity field blank. If multiple pages of items exist, press [ENTER] to scroll forward.

13. If you have specified more than 1 major, intermediate or minor category, there will be a screen like this for each combination. Press [ENTER] to view additional screens of information and enter quantities.

14. When you have entered quantities for the desired items, press [PF4] to continue with the order.

51846 6956

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

15. The system now displays the order for you to review:.

```
402  GJ1584UN              SALES MATERIALS SYSTEM               01/19/93 08:32
                               ORDER REVIEW              ORDER NUMBER: 3019-0056

                                                         MAXIMUM ORIGINAL  L   REMAIN
 SKU   (LINES 1 - 2 OF 2 SHOWN)                            ORDER    ALLOC  E    ALLOC
 QTY   ITEM  DESCRIPTION------------  UNITS/SKU             QTY      QTY  V      QTY
 1___  208353 CAMEL 3-D CIGARETTES S    10 BOX                          0            0
 1___  208408 CAMEL BUSINESS HOURS O    10 BOX                          0            0

(*) ASTERISKS INDICATE THAT THE MAXIMUM ORDER QTY WAS ORIGINALLY EXCEEDED
PF3  - RETURN TO PREVIOUS SCREEN    PF7 - SCROLL UP
PF4  - CONTINUE WITH ORDER          PF8 - SCROLL DOWN
PF12 - MAIN MENU                                                      PF1 - HELP
```

16. The SMS Order Review screen displays the required SKU quantity of each item requested and units per SKU. It also indicates the maximum order quantity, current allocation quantity, and remaining allocation quantity (if any).

17. As with the previous screen, you can modify the quantities indicated.

18. Press [PF4] to continue with the order entry process.

51846 6957

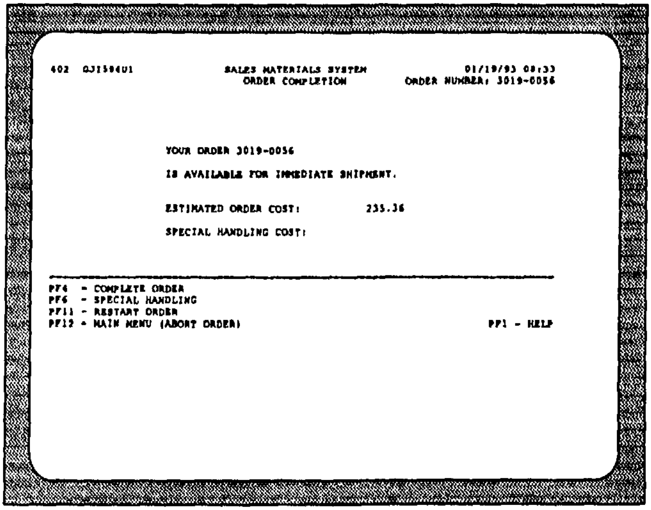
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

19. The system now checks the inventory to determine if all of the items needed are available. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder. This screen allows you to:

- Continue with this order and put the missing items on back order.
- Continue with this order and cancel items on back order.
- Suspend the order, reserving inventory for the available items.
- Cancel the order.

(This screen is shown in the discussion on entering a promotion order.)

20. If all items *are in inventory*, the system will display the Order Completion screen.



21. This screen provides you with your order number and cost.

WARNING: This is the point of no return! If you go forward from here, an order will be generated.

51846 6958

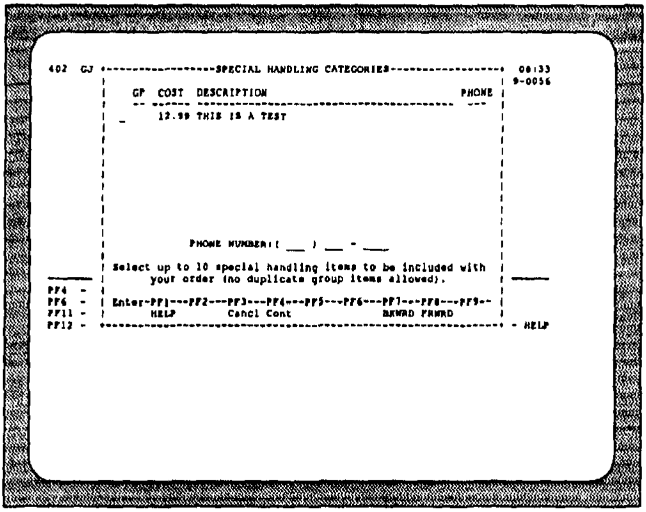
 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

22. From this screen you can:

- Press [PF4] to continue with the order entry process. This should only be used if you are sure you want to generate the order!
- Press [PF6] to request special handling.
- Press [PF11] to restart this order (return to order type selection screen=). The order you have entered will be lost. This should be used if you wish to start over.
- Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

23. If you need to request special handling press [PF6]. The system will display a list of options.



24. Enter X beside each option needed. As many as 10 options can be selected. When you are ready to continue press [PF4]. The system will return to the Order Completion screen and display the handling costs.

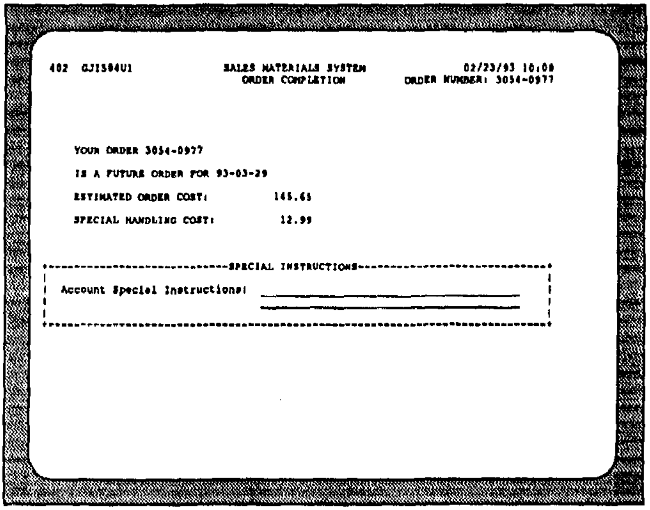
51846 6959

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

25. If you wish to generate the orde, press [PF4]. Otherwise, use one of the other options.

26. When [PF4] is pressed, the following window will be displayed.



```
402  GJIS04U1              SALES MATERIALS SYSTEM              02/23/93 10:00
                              ORDER COMPLETION          ORDER NUMBER: 3054-0977

    YOUR ORDER 3054-0977

    IS A FUTURE ORDER FOR 93-03-29

    ESTIMATED ORDER COST:          145.65

    SPECIAL HANDLING COST:          12.99

+--------------------------SPECIAL INSTRUCTIONS--------------------------+
|                                                                        |
|  Account Special Instructions:  ____________________________________   |
|                                 ____________________________________   |
|                                                                        |
+------------------------------------------------------------------------+
```

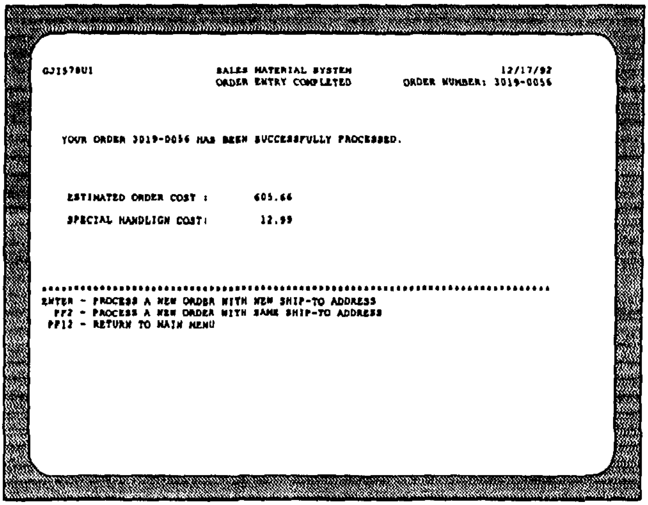
27. Enter any special instructions or sales rep information in the space provided. This entry is optional. (This information was previously entered on the Address Screen but was moved because of processing procedures.)

28. When you are ready to continue, press [ENTER]. The order is generated and the following screen is displayed.

51846 6960

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



29. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

30. From here you can:

- Press [ENTER] to process another order with a different ship-to address.
- Press [PF2] to process another order with the same ship-to address.
- Press [PF12] to return to the SMS Order Entry Menu.

51846 6961

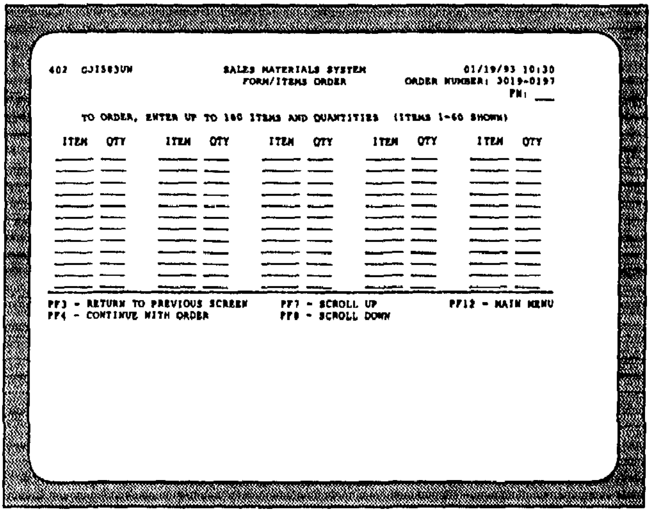
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Form/Items Order

Use this option when you want know the item numbers of the items you wish to order. It allows you to enter the item numbers/quantities directly.

1. When Form/Items Order is selected, the following screen is displayed.



402 CJIS03UN SALES MATERIALS SYSTEM 01/19/93 10:30
FORM/ITEMS ORDER ORDER NUMBER: 3019-0197
PN: ___

TO ORDER, ENTER UP TO 100 ITEMS AND QUANTITIES (ITEMS 1-60 SHOWN)

ITEM	QTY	ITEM	QTY	ITEM	QTY	ITEM	QTY	ITEM	QTY

PF3 - RETURN TO PREVIOUS SCREEN PF7 - SCROLL UP PF12 - MAIN MENU
PF4 - CONTINUE WITH ORDER PF8 - SCROLL DOWN

2. Enter the item number and quantity of each item you wish to order. As many as 60 different items can be specified.

3. Press [PF4] to continue. The Order Review screen will be displayed.

   On this screen you can modify the SKU quantity. To continue, press [PF4].

51846 6962

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The system now checks the inventory to determine whether all items needed are available.

   - If any of the requested items are *not currently in inventory*, a screen will be displayed listing the items/quantities that will be placed on backorder.

     WARNING! This is the point of no return! If you go forward from here, an order will be generated!

   - If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost.

     WARNING! This is the point of no return! If you go forward from here, an order will be generated!

5. If you have reached the Order Completion screen, the same options are available as for the Category order type:

   - Press [PF4] to process this order. This should only be used if you are sure you want to generate the order!
   - Press [PF6] to request special handling.
   - Press [PF11] to restart this order (return to order type selection screen). The order you have entered will be lost. This should be used if you wish to start over.
   - Press [PF12] to abort this order (return to SMS Main Menu). The order you have entered will be lost.

6. When you are ready to generate the order, press [PF4]. The order is generated and the following screen is displayed.

51846 6963

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
GJ1578U1                    SALES MATERIAL SYSTEM                  12/17/92
                            ORDER ENTRY COMPLETED      ORDER NUMBER: 3154-1307


  YOUR ORDER 3154-1307 HAS BEEN SUCCESSFULLY PROCESSED.


   ESTIMATED ORDER COST :       145.65

   SPECIAL HANDLIGN COST:



.................................................................................
ENTER - PROCESS A NEW ORDER WITH NEW SHIP-TO ADDRESS
  PF2 - PROCESS A NEW ORDER WITH SAME SHIP-TO ADDRESS
 PF12 - RETURN TO MAIN MENU
```

7. At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.

8. From here you can:

   - Press [ENTER] to process another order with a different ship-to address.
   - Press [PF2] to process another order with the same ship-to address.
   - Press [PF12] to return to the SMS Order Entry Menu.

51846 6964

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Promotion Order

Use this option when you wish to order items for a particular promotion.

1. When Promotion Order is selected, the Promotion Selection screen is displayed.

```
402  GJG175UN              SALES MATERIALS SYSTEM            01/19/93 10:50
                            PROMOTION SELECTION        ORDER NUMBER: 3019-0197
List from: 200382                                                      FN: ___
                           Starting  Ending
   Program  Type            Date      Date    Program Title
   -------  -------       --------  --------  ---------------------------------------
_  200382   PREMIUM       02/24/92  01/29/93  CAMEL B3GF FLEECE SHORTS
_  201603   COUPON        09/21/92  01/29/93  CAM GM Q4 $2 ON-CTN CPN
_  201606   PREMIUM       09/21/92  01/29/93  CAM GM Q4 B4GF TACKLE T/BH
_  201608   PREMIUM       09/21/92  01/29/93  CAM GM Q4 B3GF HUNT'G CAP
_  201719   PREMIUM       09/21/92  01/29/93  VANTAGE B3GF 1993 PLANNER - 4TH QUARTER
_  201720   PREMIUM       09/21/92  01/29/93  VANTAGE B3GF CIGARETTE CASE- 4TH QUARTER
_  201721   PREMIUM       09/21/92  01/29/93  VANTAGE B2GF CLASSIC STYLED INK PEN
_  201723   PREMIUM       09/21/92  01/29/93  VANTAGE B2GF "PACK MATE" LIGHTER-4TH QTR
_  201830   VPR           09/21/92  01/29/93  WINSTON-$3.00/CARTON VPR 4TH QTR
_  202192   VPR           08/24/92  01/29/93  MORE4TH QTR. $.50/PK OPTION VPR
_  202204   VPR           08/24/92  01/29/93  VANTAGE 4TH QTR $.50/VPR (OPT/SALES)
_  202263   PREMIUM       08/24/92  01/29/93  MCBA-B4GF GENERIC STATE FAIR
_  202416   PREMIUM       09/21/92  01/29/93  NASA B3GF HUNTER'S ORANGE CAP
_  202520   VPR           08/31/92  01/30/93  WINSTON-NMSA CARTON BUYDOWN
_  202564   PREMIUM       09/28/92  01/28/93  SASA B1CGF LA ATLANTA T-SHIRT (HOOTERS)
PF3 - PREVIOUS SCREEN    PF7 - TOP OF DATA    PF12 - MAIN MENU     PF1 - HELP
```

2. To view additional pages of promotions, press [ENTER]. To return to the top of the list, press [PF7].

3. If you wish to narrow down this list to one particular type of promotion, position the cursor in the **TYPE** column and press [PF1] (HELP). A pop-up window will display the following options:

   - C Coupon Promotions
   - P BxGxF Promotions
   - R Premium Promotions
   - V VPR Promotions
   - ' ' (blank) All Promotion Types

   Enter the desired promotion type an press [ENTER]. The system will display only promotions for the type specified.

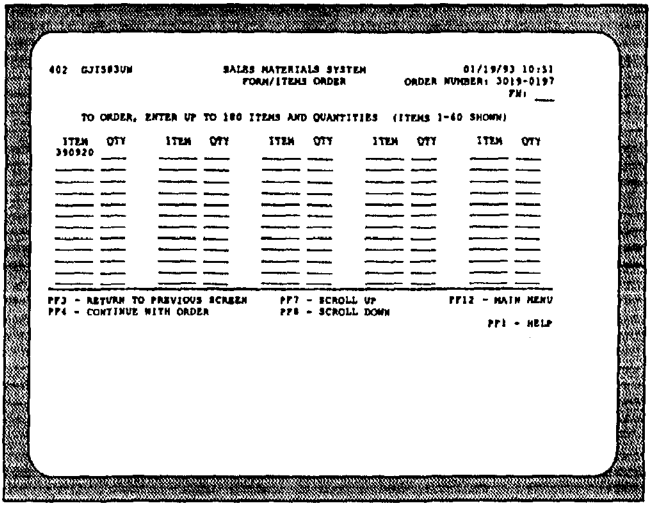
   ◆ *Note:* This step is optional.

51846 6965

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Select the promotion you wish to order items for and press [ENTER]. Only 1 promotion can be selected.

5. The Form/Items Order screen will be displayed, listing each of the items needed for the promotion.



6. Enter the quantity of each item you wish to order in the QTY field. If you do not wish to order any item, leave the ITEM and QTY fields blank.

   You may also add other items/quantities on this screen. Up to 60 items can be specified on this screen.

7. When you are ready to continue with the order press [PF4]. The Order Review screen will be displayed.

   On this screen you can modify the SKU quantity. When you are ready to continue, press [PF4].

51846 6966

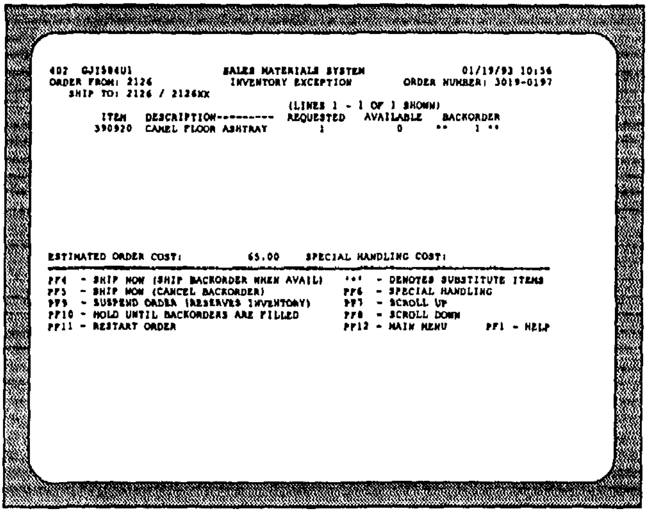
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. The system now checks the inventory to determine whether all items needed are available.

   If all items *are in inventory*, the system will display the Order Completion screen. This screen provides you with your order number and cost. If you continue with the order process from this screen, the order will be generated.

9. If any of the requested items are *not currently in inventory*, a screen will be displayed which lists the items/quantities that will be placed on backorder.



10. For each item needed, this screen indicates the quantity requested, available, and on backorder. From this screen you can:

    - Press [PF4] to ship the available items and put the missing items on back order. **This will process the order!**
    - Press [PF5] to ship the available items and cancel the items on back order. **This will process the order!**
    - Press [PF6] to request special handling.
    - Press [PF9] to suspend the order. (This will reserve inventory for your order but will not process the order.) When [PF9] is pressed, you will be prompted to enter special Sales Rep instructions (optional).

51846 6967

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Press [PF10] to hold the entire order until backorders are filled. When [PF10] is pressed, you will be prompted to enter special Sales Rep instructions (optional).
- Press [PF11] cancel the entire order.

11. If you need to request special handling, press [PF6].
12. To continue with the order entry process, press [PF4] or [PF5]. The system will prompt you to enter any special Sales Rep instructions. When you are ready to continue, press [ENTER]. Your order will be generated and the following message is displayed:

    YOUR ORDER ####-#### HAS BEEN SUCCESSFULLY PROCESSED.

    At this point, the system has adjusted the inventory to reflect your order, modified any allocations, and stored the order on the order file.
13. From here you can:
    - Press [ENTER] to process another order with a different ship-to address.
    - Press [PF2] to process another order with the same ship-to address.
    - Press [PF12] to return to the SMS Order Entry Menu.

51846 6968

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Copy Existing Order

Use this option when you wish to copy the items/quantities on an existing order to a new order. This is a fast way to create an order when the items/quantities for the two orders are similar.

1. When this option is selected the system will prompt you to enter the number of the order you wish to copy. The order specified must be a valid SMS order number.

2. When [ENTER] is pressed the Form/Items Order screen is displayed. This screen lists the items/quantities of the "copy from" order.

3. Modify the items/quantities, as desired. You may also add new items.

4. The remainder of this process is the same as for promotion orders. Refer to steps 7-13 in the previous section for additional information.

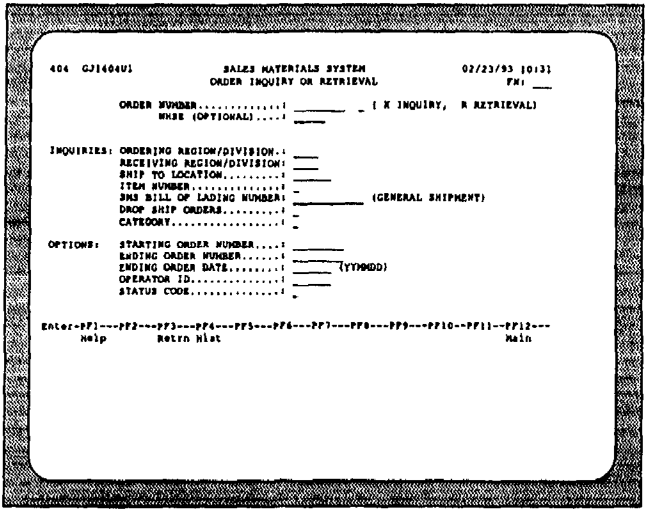
Function 404 - Order Inquiry or Retrieval

This function is used to retrieve an order for viewing, modification, or cancellation. It combines the functionality previously available from functions 403 and 404.

Procedures

1. Log on to SMS and invoke function 404, Order Inquiry or Retrieval.

2. The following screen is displayed.



```
404  GJ1404U1            SALES MATERIALS SYSTEM            02/23/93 10131
                        ORDER INQUIRY OR RETRIEVAL                   FN: ___

           ORDER NUMBER...............: ________ _ ( X INQUIRY,  R RETRIEVAL)
                 WHSE (OPTIONAL)....: ____

INQUIRIES: ORDERING REGION/DIVISION.: ___
           RECEIVING REGION/DIVISION: ___
           SHIP TO LOCATION.........: _____
           ITEM NUMBER..............: _
           SMS BILL OF LADING NUMBER: __________ (GENERAL SHIPMENT)
           DROP SHIP ORDERS.........: _
           CATEGORY.................: _

OPTIONS:   STARTING ORDER NUMBER....: _______
           ENDING ORDER NUMBER......: _______
           ENDING ORDER DATE........: _____ (YYMMDD)
           OPERATOR ID..............: _____
           STATUS CODE..............: _

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help        Retrn Hist                                          Main
```

3. The fastest way to retrieve an order is to enter the order number and, optionally, the warehouse (for multi-warehouse orders). Enter an X beside

51846 6969

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

the order number if you only wish to *view* the order; enter R if you wish to *retrieve* the order for modification or cancellation.

4. If you do not know the number of the order you wish to view or retrieve, the lower portion of the screen contains 2 categories of selections that are used to obtain an order list:

   - **INQUIRIES** - Used to obtain a list of orders for a particular parameter, such as order Division, general shipments, etc. You can specify multiple inquiries in combination with one another, and/or with one or more options.

   - **OPTIONS** - Used to further qualify the list of orders requested. Multiple options can be specified.

5. Following is a brief description of each *inquiry*:

   - **ORDER REGION/DIVISION** - Use this option to include only orders for a particular ordering Region or Division.

   - **RECEIVING REGION/DIVISION** - Use this option to include only orders for a particular receiving Region or Division.

   - **SHIP-TO LOCATION** - Use this option to include only orders for a particular SIS account.

   - **ITEM NUMBER** - Use this option to include only orders with a particular item number on the order.

   - **SMS BILL OF LADING NUMBER** - Use this option to include only orders with a particular SMS bill of lading number.

   - **MASTER ORDER NUMBER** - Use this option to include only general shipment orders. These are orders which are exploded for each location/SIS account on the locators lists.

   - **DROP SHIP ORDERS** - Mark this option to include only drop shipment orders.

   - **CATEGORY** - Mark this option to obtain a list of orders for a particular major, intermediate, or minor category (or combination).

6. Following is a brief definition of each *option*:

   - **STARTING/ENDING ORDER NUMBER** - Used to specify a range of orders to be included in the list. The list will begin with the **STARTING** order number specified and display orders in reverse sequence by date (i.e., from newest to oldest) back to the **ENDING** order number specified.

51846 6970

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **ENDING ORDER DATE** - The list will include only orders that were entered from the date specified, up through the current date.
- **STATUS CODE** -The list will include only orders with the status code(s) specified.
- **OPERATOR ID** - The list will include only orders entered by the operator ID specified.

7. As stated earlier, the quickest way to view an order is to enter the order number. However, if you do not know the order number, the *inquiries* and *options* allow you to specify criteria to obtain a meaningful list of orders to select from.

The remainder of this chapter provides instructions for obtaining an order for review, modification or cancellation. It is divided into the following sections:

- **SUMMARY OF PROCESS** - This section contains a summary of the steps used to obtain an SMS order to view or modify/cancel.
- **SOME EXAMPLES: SPECIFYING INQUIRIES AND OPTIONS** - This section contains some examples of how the *inquiries* and *options* can be used to obtain an order selection list.
- **MODIFYING OR CANCELING AN ORDER** - This section contains instructions for modifying or canceling an order.

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Summary of Process

1. *If you know the number* of the desired order, enter the order number. To simply view the order, enter X (inquiry); to modify or cancel the order, enter R (retrieve). When [ENTER] is pressed the order summary screen is displayed.

   ◆ *Note:* For multi-warehouse orders, you may also specify the warehouse number. This will cause the system to bypass the order summary screen (which lists items for all warehouses associated with the order) and go directly to the detail item screen for that warehouse.

2. *If you do not know the order number,* enter or select the *inquiries* and *options* criteria that define the order you wish to view. For example, to view orders for a particular Division, enter the Division code and press [ENTER]. Remember, you can enter multiple parameters — you are not limited to just one.

   ◆ *Note:* For some parameters, additional selections must be made when [ENTER] is pressed. For example, if you have marked the option, STATUS CODE, you will be prompted to select the status codes of the orders to be included. Additional selections or entries must be made for the following fields: DROP SHIP ORDERS, CATEGORY, STATUS CODES. (This is explained in more detail in the section on inquiry and option examples.)

   a. When the desired criteria have been specified and [ENTER] is pressed, the system will list the orders that match the criteria.

```
404  GJT404U2                   SALES MATERIALS SYSTEM                02/23/93 10:39
                                SUMMARY ORDER INQUIRY                        FN: ___
ORDERING:   2126XX

X  ORDER    ORDER REC SHIP    TO FROM  DATE                                  ENTRY
R  NUMBER   DIV   DIV LOCATION STATE  ENTERED   STATUS        CATEGORY      OPER ID
-- -------- ----  ---- -------- -----  -------- ------------ -------------  --------
_  23020756 2126 2126  479052   NC    10/20/92 PARTIAL      VENDING
_  23421004 2126 2126  2126XX   NC    12/07/92 PARTIAL      VENDING
_  23520131 2126 2126  099744   NC    12/17/92 PARTIAL      VENDING
_  30170053 2126 2126  2126XX   NC    01/12/93 PARTIAL      VENDING
_  30200302 2126 2126  212611   NC    01/20/93 PARTIAL      MULTI-MAJORS
_  30200784 2126 2126  2126XX   NC    01/20/93 WAITING B/O  SALES REP. S
_  30220106 2126 2126  2126XX   IL    01/22/93 WAITING B/O  PERMANENT PO
_  30350509 2126 2126  2126XX   NC    02/04/93 WAITING B/O  COMPONENT
_  30360775 2126 2126  321360   NC    02/05/93 WAITING B/O  MULTI-MAJORS
_  30490606 2126 2126  920209   IL    02/18/93 PICKLIST     PERMANENT DI  WB812
_  30500330 2126 2126  192150   NC    02/19/93 STAGED       VENDING
_  30500337 2126 2126  192150   NC    02/19/93 PARTIAL      SALES REP. S

              ENTER 'X' (DETAIL INQUIRY) OR 'R' (ORDER RETRIEVAL)
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP        RETRN                       BKWRD FRWRD                  MAIN
```

51846 6972

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

b. This screen displays orders which match the parameters specified on the previous screen. This same type of information is displayed regardless of the options specified on the previous screen.

If this screen is full, press [BKWRD]/[FWRD] to scroll through the list.

c. From this screen enter X to simply view the order, or R to retrieve an order (for modification or cancellation).

3. When an order is requested for viewing only (via X), a screen similar to the following is displayed.

```
404  GJ1404UO              SALES MATERIAL SYSTEM              05/12/93 09:41
                     ORDER INQUIRY FOR: 3089-0009 COMMENTS AVAILABLE FN
                                                    ORDER STATUS: PICKLIST
      ORDER FROM: 2126XX                     SHIP TO: 2126XX / 2126XX
W100   LENTS, W-S, NC                         F. J. ARMSTRONG, JR.
       5900 GRASSY CREEK BLVD                 8100 NORTH POINT BLVD
                                              SUITE B
       WINSTON SALEM NC 271051205             WINSTON-SALEM NC 27105
ORDER TOTAL  TOTAL QTY  AVAILABLE QTY  BO QTY PHONE NUMBER: (919) 741-7757
 CASES...:      25          25
 WEIGHT..:      30.6500     30.6500
 CUBE....:       1.6750      1.6750
 EST COST:      82.92       82.92                     (ITEMS 1 - 5 OF 5 SHOWN)
         ORDER  BO    BO                                        STATUS
   ITEM   QTY   QTY  HELD  DESCRIPTION                          DATE   STATUS
  404461    5              M/B DUMP BIN RISER                   930331 SHIPPED
  404472    5              M/B PREM DIS RISER                   930331 SHIPPED
  404483    5              M/B 24" PKG MERCH                    930331 SHIPPED
  404494    5              M/B STATIC CLING STRIP               930330 RELEASED
  404505    5              M/B MILITARY FOLDED STRIP            930331 SHIPPED

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  SpHdl Retrn                   Item- Item+ Comm  <---  ---> Main
```

4. This screen displays information for the requested order, including ship-from warehouse, ship-to information, order totals, and order items.

For orders sourced from multiple warehouses, this screen provides a summary of items and totals for all warehouses, regardless of the warehouse they were ordered from. To view items by individual warehouses, use [PF5] (DTAIL).

51846 6973

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. From this screen you can use the following PF keys:

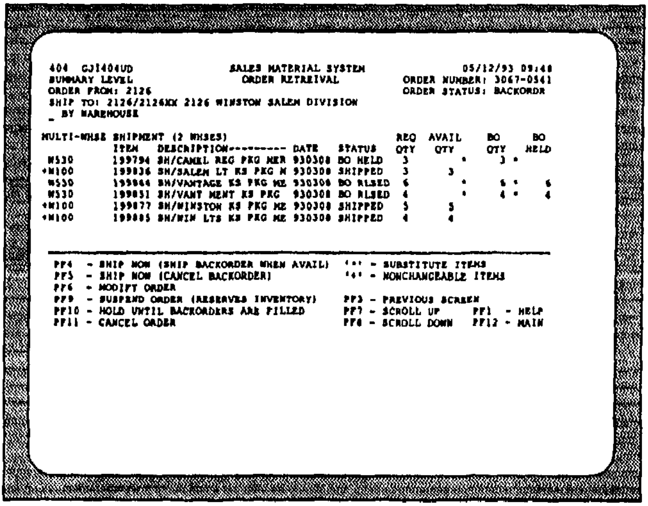
   - [PF2] (SPHDL) - Used to view special handling costs associated with the order.
   - [PF11]/[PF10] (-->)/(<--) - Used to scroll right and view additional information for the order, such as delivery date, travel days, drop ship information, and special instructions.
   - [PF8]/[PF7] (ITEM+)/([ITEM-) - Used to view additional items on this order when all of the items will not fit on one screen.
   - [PF9] (COMM) - Used to view/enter comments pertaining to the order. For multi-warehouse orders the following rules apply:
     - When this PF key is invoked from the warehouse *summary* screen, the notes will automatically be appended to all warehouses associated with the order.
     - When this PF key is invoked from the warehouse *detail* screen, you have the option of applying the notes to the current warehouse only or to all warehouses associated with the order.
   - [PF5] (DTAIL) - This key is only available for orders sourced from multiple warehouses. When [DTAIL] is pressed, the system displays only items sourced from the first warehouse. Press [WH++]/[WH--] from the detail screen to scroll through and view item information for other warehouses. The [ITEM+]/[ITEM-] keys are also available from the warehouse detail screens.

6. If an order was selected for retrieval (via R), the screen is arranged somewhat differently.

51846 6974

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



```
404  GJ1404UD              SALES MATERIAL SYSTEM           05/12/93 09:48
SUMMARY LEVEL                 ORDER RETREIVAL         ORDER NUMBER: 3067-0541
ORDER FROM: 2126                                      ORDER STATUS: BACKORDR
SHIP TO: 2126/2126XX 2126 WINSTON SALEM DIVISION
_ BY WAREHOUSE

MULTI-WHSE SHIPMENT (2 WHSES)                           REQ  AVAIL   BO    BO
        ITEM   DESCRIPTION---------- DATE   STATUS     QTY   QTY    QTY  HELD
 W530   199794 SH/CAMEL REG PKG MER 930308 BO HELD    3          *   3 *
+W100   199836 SH/SALEM LT KS PKG M 930308 SHIPPED    3      3
 W530   199844 SH/VANTAGE KS PKG ME 930308 BO RLSED   6          *   6 *    6
 W530   199851 SH/VANT MENT KS PKG  930308 BO RLSED   4          *   4 *    4
+W100   199877 SH/WINSTON KS PKG ME 930308 SHIPPED    5      5
+W100   199885 SH/WIN LTS KS PKG ME 930308 SHIPPED    4      4

PF4  - SHIP NOW (SHIP BACKORDER WHEN AVAIL)   '*' - SUBSTITUTE ITEMS
PF5  - SHIP NOW (CANCEL BACKORDER)            '+' - NONCHANGEABLE ITEMS
PF6  - MODIFY ORDER
PF9  - SUSPEND ORDER (RESERVES INVENTORY)     PF3 - PREVIOUS SCREEN
PF10 - HOLD UNTIL BACKORDERS ARE FILLED       PF7 - SCROLL UP     PF1  - HELP
PF11 - CANCEL ORDER                           PF8 - SCROLL DOWN   PF12 - MAIN
```

7. As with the inquiry screen, the retrieval screen displays the items on the requested order. However, the order can actually be modified or canceled from this screen.

   ◆ *Note:* Items marked with "*" are substituted items; items marked with "+" cannot be changed.

8. The PF keys used to modify/cancel the order are described below, and are discussed in more detail in the section, *Modifying or Canceling an Order.*

   ◆ *Note:* For multi-warehouse orders, these actions can be performed for the order as a whole, or for each individual warehouse. To view/ modify order information by individual warehouse, mark the **BY WAREHOUSE** option displayed at the top of the screen.

- [PF2] - Next warehouse - Available only for multi-warehouse orders, when "BY WAREHOUSE" has been selected. Allows you to view/modify/cancel order items on a warehouse-by-warehouse basis instead for the order as a whole.
- [PF4] - Ship now (ship backorder when available) - Used to ship all available items now; items on backorder will be shipped when available.
- [PF5] - Ship now (cancel backorder) - Used to ship all available items now and cancel items on backorder.

51846 6975

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- [PF6] - Modify order - Used to modify order items, quantities and future delivery date.
- [PF10] - Hold until backorders are filled - Used to hold all items until items on backorder are available. All items will be shipped together at one time.
- [PF11] - Cancel order - Used to cancel the order.

9. When you are ready to exit, press [PF3]. The system will return to the list of orders if you have selected the order, or to the function 404 menu if you entered the order directly.

This section has provided an overview of the process of obtaining an SMS order for inquiry or retrieval. The following section provides some detailed examples of how the *inquiries* and *options* can be used to assist in the process of obtaining a particular order.

Examples: Specifying Inquiries and Options

If you do not know the order number you wish to view or retrieve, use the *inquiries* and *options* to narrow down the order selection list. This will make it easier to locate the order you are looking for.

Following are a few examples of the types of order lists you can obtain by using the *inquiries* and *options:*

- View general shipment orders
- View drop ship orders for ordering Region/Division
- View orders entered by a particular operator ID
- View orders for a particular category
- View orders for one or more status codes

A more detailed explanation of each example follows. However, you are not limited to these examples — you may use any combination of inquiries and options to obtain an order selection list.

51846 6976

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Master Order Number

Mark the **MASTER ORDER NUMBER** option to view an order selection list similar to the following:

```
404  GJ1404UB                 SALES MATERIAL SYSTEM                  05/12/93 12:1
                              SUMMARY ORDER INQUIRY                        FN: __
 GENERAL SHPMTS

X  ORDER     ORDER  REC  SHIP TO  FROM                                      ENTRY
R  NUMBER    DIV    DIV LOCATION  STATE    CATEGORY        DROPSHIP NAME   OPER ID
-  --------  ----   ---- -------- -----  --------------  ---------------  -------
_  30630980  6740                        SPCL/TEST ITEMS                   WSATF

                ENTER 'X' (DETAIL INQUIRY) OR 'R' (ORDER RETRIEVAL)
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
      Help        Retrn Hist              Bkwrd Frwrd                   Main
```

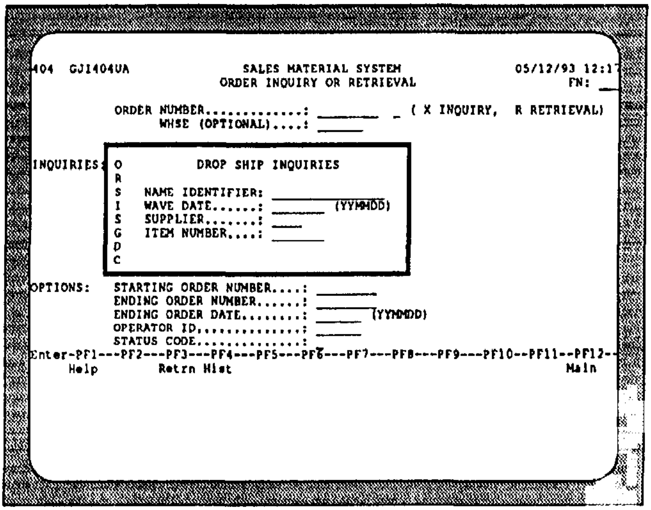
Select the desired order with an X (inquiry) or R (retrieve).

51846 6977

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

■ Drop Ship Orders for Region/Division

Enter the **ORDERING REGION/DIVISION** and mark the **DROP SHIP ORDERS** option. The following window is displayed.



If you wish to further restrict the search, enter information in one or more of the fields displayed in the pop-up window. The system will retrieve a list of orders that match any criteria specified on the previous screen and in this window.

When the list is displayed, select the desired order with an X (inquiry) or R (retrieve).

■ Orders for Operator ID

Enter an **OPERATOR ID** to view a list of orders entered by a particular person. When the list is displayed, select the order you wish to view or retrieve with an X or R.

51846 6978

© R.J. Reynolds Tobacco Company 1993

■ By Category

1. Mark the **CATEGORY** option to obtain a list by category (such as permanent POS items, premiums, coupons, etc.). The major categories window is displayed.

```
404  GJI404UA              SALES MATERIAL SYSTEM                05/12/93 13:0
                          ORDER INQUIRY OR RETRIEVAL                  FN: _

                              MAJOR CATEGORIES

   TEMPORARY POS        _ PERMANENT POS          _ CTN MERCH/ELEC SEC
   PACKAGE MERCH        _ PERMANENT DISPLAYS     _ SALES REP. SUPPLIES
   MILITARY             _ VENDING                _ PREMIUMS
   SPECIALTY MATERIALS  _ SPCL/TEST ITEMS(TOB)   _ OFFICE SUPPLIES
   COUPONS              _ REFURBISHING           _ WOOD SPRING LD-SPEC
   ON-SERTS             _                        _

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--P
      Help        Cancl Hist  Cont        Bkwrd Frwrd
```

2. From this screen, press [PF7]/[PF8] to scroll through the list of major categories. You can select a category and use one of the following options:

   - Press [ENTER] to view intermediate categories for the major category selected.
   - Press [PF4] (HIST) to access the order history file and view a list of orders for the selected category. Orders in the history file have already been shipped.
   - Press [PF5] (CONT) to access the current order file and view a list of orders for the selected category. These are orders which have not been shipped.

51846 6979

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. When [HIST] or [CONT] is pressed, the system will display a selection list similar to, except it will show orders from the history/current file for the category selected. Select the desired order with an X (inquiry) or R (retrieve).

4. When [ENTER] is pressed (instead of [HIST] or [CONT]), the system displays the intermediate categories screen.

```
404  GJI404UA            SALES MATERIAL SYSTEM              05/12/93 13:07
                      ORDER INQUIRY OR RETRIEVAL                   FN: _
                        INTERMEDIATE CATEGORIES
  _ CAMEL               _ CENTURY               _ DORAL
  _ MORE                _ NOW                   _ RITZ
  _ SALEM               _ VANTAGE               _ WINSTON
  _ NEW/TEST            _ DISPLAYS              _ SNACK-ALONGS
  _ MISCELLANEOUS       _ DAKOTA                _ NG/SSG PROJECT
  _ PREMIER             _ CHELSEA               _ UPTOWN
  _ SALEM GOLD          _ STERLING              _ MILITARY POS
  _ PACK PROM-RIP       _ PACK PROMOTION POS    _ SEMI-PERMANENT POS
  _ MIP - POS           _ RIP-POS               _ MULTI-BRAND-
  _ MAGNA               _ HORIZON               _ OPPORTUNISTIC
  _ CHAIN SPECFIC       _ COUPON CADDY          _ MAGNA/STERLING

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--P
      Help        Cancl Hist  Cont        Bkwrd Frwrd
```

5. This screen is similar to the major categories screen. From this screen, press [PF7]/[PF8] to scroll through the list of intermediate categories. You can select a category and use one of the following options:

- Press [ENTER] to view minor categories for the intermediate category selected (see •• Cited Item Has Been Deleted ••).
- Press [PF4] (HIST) to access the order history file and view a list of orders for the selected category.
- Press [PF5] (CONT) to access the current order file and view a list of orders for the selected category.

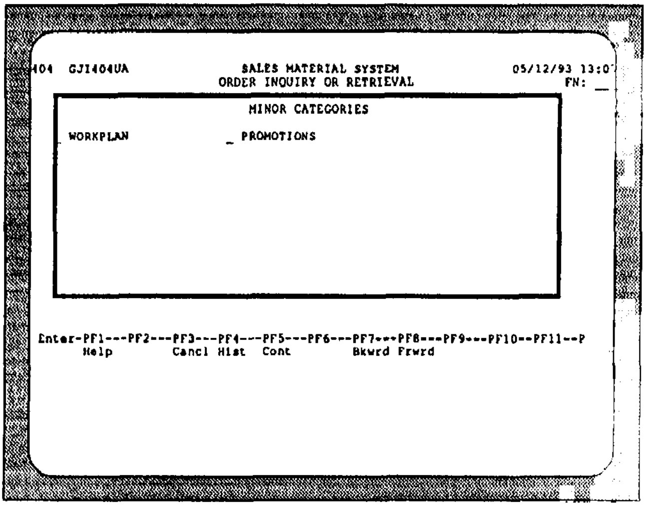
51846 6980

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. As with the major categories, when [HIST] or [CONT] is pressed, the system will display an order. Select the desired order with an X (inquiry) or R (retrieve).

7. When [ENTER] is pressed (instead of [HIST] or [CONT]), the system displays the minor categories screen.



8. This screen is similar to the major and intermediate categories screens. From this screen, press [PF7]/[PF8] to scroll through the list of minor categories.

9. Select a category and press [ENTER] to view a selection list. Select the desired order with an X (inquiry) or R (retrieve).

51846 6981

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Ordering Region/Division and Status Code

1. Enter an ordering Region/Division and mark the **STATUS CODE** option. The following pop-up window is displayed.

```
404  GJI404UA              SALES MATERIAL SYSTEM                05/12/93 13:3
                        ORDER INQUIRY OR RETRIEVAL                   FN: _

            ORDER NUMBER.............: _______ _ ( X INQUIRY,  R RETRIEVAL)
                 WHSE (OPTIONAL)....: _____

INQUIRIES:  ORDERING REGION/DIVISION.: 2126
            RECEIVING REGION/DIVISION: ___
            SHIP TO LOCATION.........: _____
            ITEM NUMBER..............: _____
            SMS BILL OF LADING NUMBER: __________
            GENERAL SHIPMENT ORDERS..: _        VALID STATUS CODES
            DROP SHIP ORDERS.........: _
            CATEGORY.................: _      _ ENTERED   _ PARTIAL
OPTIONS:    STARTING ORDER NUMBER....: _____  _ PICKLIST  _ HELD
            ENDING ORDER NUMBER......: _____  _ STAGED    _ SUSPEND
            ENDING ORDER DATE........: _____(YYM _ SHIPPED _ CANCEL
            OPERATOR ID..............: _____  _ FUTURE    _ DROPSHIP
            STATUS CODE..............: X
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
      Help        Retrn Hist                                          Main
```

2. Select the status codes associated with the orders you wish to view. For example, to view all orders with backordered items, mark the **BACKORDER** option. Multiple selections may be made.

3. When you have completed your selections, the system will retrieve a list of orders that match any criteria specified on the previous screen and in this window.

   When the list is displayed, select the desired order with an X (inquiry) or R (retrieve).

51846 6982

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Modifying or Canceling an Order

As mentioned under *Summary of Process*, the format of the order screen you view will vary depending on whether you have requested to *inquire* on the order (via X) or *retrieve* the order (via R).

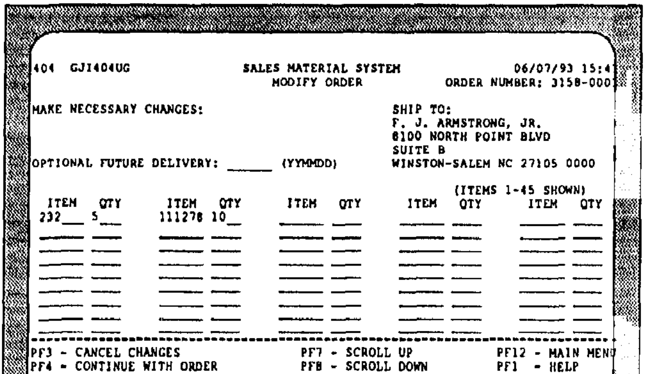
In addition, if you are viewing a multi-warehouse order, the screen will vary slightly depending on whether you are viewing the order as a whole, or by individual warehouse.

In this section, we will explain how to modify or cancel an order you have retrieved. You must have marked the order with an R to perform these functions. The order can be for a single warehouse or multiple warehouses.

NOTE: A multi-warehouse order can be modified as a whole, or by individual warehouse. To modify or cancel a multi-warehouse order by individual warehouse, enter X in the **BY WAREHOUSE** field and press [ENTER]. To view items for the next/previous warehouse, press [PF2].

■ Modify Order (PF6)

1. To modify an order, press [PF6]. The following screen is displayed.



2. If this screen is full, press [PF8]/[PF7] to scroll through/view additional items. Note that this screen is very similar to the Forms/Items order entry screen.

51846 6983

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. On this screen you can modify the following information:

 - Delivery date
 - Order items (add or delete)
 - Item quantities

4. When all modifications are complete, press [PF4] to continue. The Order Review screen is displayed. On this screen you can modify the SKU quantities for the line items shown.

5. When all modifications are complete, press [PF4] again to continue. The Order Completion screen displays the estimated order cost.

❖ *Note:* If any items requested are on backorder, an inventory exception screen is displayed instead of the Order Completion screen.

6. From the Order Completion screen you can:

 - Complete order modifications by pressing [PF4].
 - Specify special handling by pressing [PF6].
 - Cancel order modifications by pressing [PF12].

7. When [PF4] is pressed to complete order modifications, a pop-up window prompts you for special instructions. Enter any special instructions (if desired) and press [ENTER] to continue.

8. The Order Entry Completed screen confirms that the order has been processed. From here you can:

 - Press [ENTER] to return to the Order Inquiry Men.
 - Press [PF9] to add comments to the order.
 - Press [PF12] to return to the SMS Order Entry Menu.

51846 6984

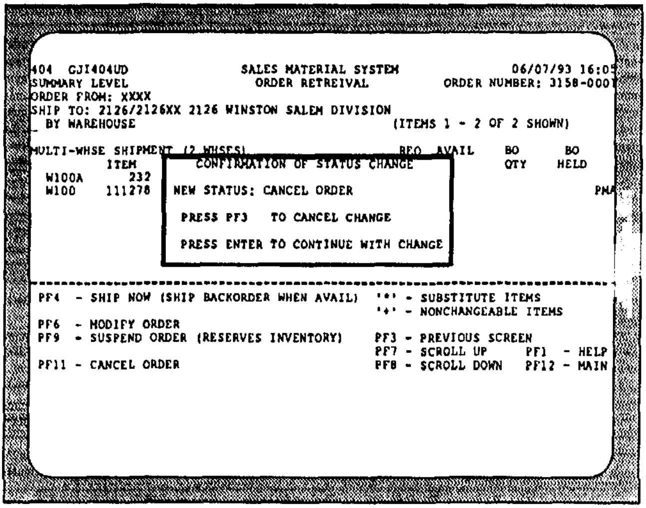
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

■ Cancel Order (PF11)

1. If you wish to cancel an order you have retrieved, press [PF11].

2. The following window will be displayed.



3. If you wish to cancel the order, press [ENTER]. If you do not wish to cancel the order, press [PF3].

Function 405 - List of Materials

For the MC to determine whether parts are available from the operations unit warehouse, it is often necessary to pull up a list of items needed to satisfy a particular diagram number.

51846 6985

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

1. With the SMS Main Menu displayed, enter 405 in the FN field and press [ENTER].

```
   UTIMENU                         SALES MATERIALS                        04/21/9
TEST - SMSLIB                         MAIN MENU                             08:
---------------- COPYRIGHT (C) R J REYNOLDS TOBACCO CO 1989 ----------------
FS  - change to f/s 2126              |  501 - SMS ALLOCATION MAINTENANCE
                                      |  508 - SMS ALLOCATION INQUIRY BY IT
001 - SMS SECURITY LEVEL M            |  509 - SMS ALLOCATION TRANFERS
022 - SKU USAGE BY ITEM BY MONTH      |  523 - ALLOC BY ITEM REPORT
028 - FIND BACK ROOM INVENTORY        |  524 - ALLOC BY SALES LEVEL RPT
030 - SMM & TRAFFIC PHONE DIRECTORY   |  525 - ALLOCATION TRANSFER AUDIT RP
116 - FIND BACKORDERS FOR LOCATION    |  551 - WORKPLAN PROGRAM COMMUNICATI
125 - FS RECEIPT                      |  555 - WORK PLANS
126 - FS RECEIPT CORRECTION           |  559 - DIVISION MARKETING INDICATOR
210 - ITEM MASTER DISPLAY F/S         |  560 - 3rd qtr workplan budget rpt
391 - INVENTORY MGMT UPDATE FUNC.     |  566 - RETAIL ACTIVITY TRACKING RPT
402 - ENTER ORDERS                    |  570 - WORKPLAN COMMUNICATIONS REPO
404 - ORDER INQUIRY                   |  572 - Full-priced workplan budget
405 - LIST OF MATERIALS               |  598 - PRINT WORKPLAN BOOK
406 - hey test this new order inq     |  599 - work-plan budget report
417 - SPECIAL HANDLING                |  803 - PRINT REPORT STATUS SCREEN
----------------------------------------------------------------------------
                                                                        FN: 4
nter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
     MENU
```

51846 6986

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PRELIMINARY SMS FUNCTION OVERVIEW

2. The following screen will be displayed. Place an "X" beside the type of rack in question and press [ENTER].

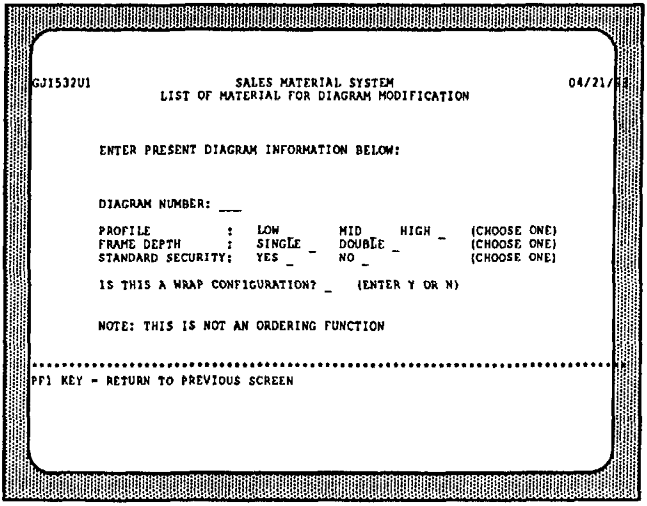
```
GJI532MN                    SALES MATERIAL SYSTEM                    04/21/93
                            LIST OF MATERIAL MENU

                  PLACE AN 'X' NEXT TO ONE FUNCTION:

                            _ DIAGRAM MODIFICATION (FLEX)
                            _ FLEX/SPRG LOAD/STRIKE ZONE/PERF PRESENCE
                            _ END CAP/WRAP (FLEX)

                  NOTE: THESE ARE NOT ORDERING FUNCTIONS

.............................................................................
PF1 KEY - RETURN TO PREVIOUS SCREEN
```

51846 6987

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. Depending on which option you selected, the system will display a new screen. Enter the diagram number and options required and press [ENTER].


```
GJ1532U1                 SALES MATERIAL SYSTEM                    04/21/
                LIST OF MATERIAL FOR DIAGRAM MODIFICATION

       ENTER PRESENT DIAGRAM INFORMATION BELOW:

       DIAGRAM NUMBER: ___

       PROFILE           :  LOW       MID    HIGH _   (CHOOSE ONE)
       FRAME DEPTH       :  SINGLE _  DOUBLE _        (CHOOSE ONE)
       STANDARD SECURITY:   YES _     NO _            (CHOOSE ONE)

       IS THIS A WRAP CONFIGURATION? _   (ENTER Y OR N)

       NOTE: THIS IS NOT AN ORDERING FUNCTION
..........................................................................
PF1 KEY - RETURN TO PREVIOUS SCREEN
```

4. With the next screen displayed, give a brief description of the rack type chosen. If correct, press [ENTER]. This screen indicates all component parts needed for individual fixtures along with individual and total costs associated with the set.

5. Compare the list of materials required to existing backroom supplies to determine what back room items can be used. Note which items must be ordered.

51846 6988

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 406 - Order/Item Inquiry #2

Another inquiry function similar to 404, this selection retains data relative to orders for a longer period of time than 404. It also provides more options/combinations with which to place inquires.

1. Any combination of the above 8 options may be utilized to track down information relative to a given order.

   EXCEPTION: Within a given option, only one choice may be made (ex: only one of three choices under "6" below could be selected).

```
GJG710IN              S A L E S   M A T E R I A L S          05/11/93  09:48
                           ORDER INQUIRY SELECTION

    1.  ORDER NUMBER:                ________
    2.  ITEM NUMBER:                 ______
    3.  SMS BILL OF LADING NUMBER:   ___________
    4.  BACKORDERS:                  _
    5.  DROP SHIPMENTS NAME:         _____________  WAVE DATE: (YYMMDD) ______
          ENTER SUPPLIER: ____ AND ITEM: ____ TO SCAN FOR KEYING ERRORS

    6.  RECEIVING REGION/DIVISION:   ____        SELECT ONLY 1 FROM OPTION 6
        ORDERING  REGION/DIVISION:   ____
        SHIP TO LOCATION:            ______

    OPTIONAL (CAN BE USED WITH ANY OF THE ABOVE)
    7.  STARTING FROM ORDER DATE: (YYMMDD) ______
    8.  STATUS CODE: _ (0=ALL, 1=PRIOR TO SHIPPED, 2=SHIPPED, 3=OTHER)

    NEXT FUNCTION: ___

    PF3 TO RETURN TO MAIN MENU               PF4 SEARCH HISTORY ONLY
```

2. After pressing [ENTER], the computer will search the most recent orders for the criteria chosen. If no appropriate orders are found, it may be necessary to press [PF6] to go further back in time.

© R.J. Reynolds Tobacco Company 1993

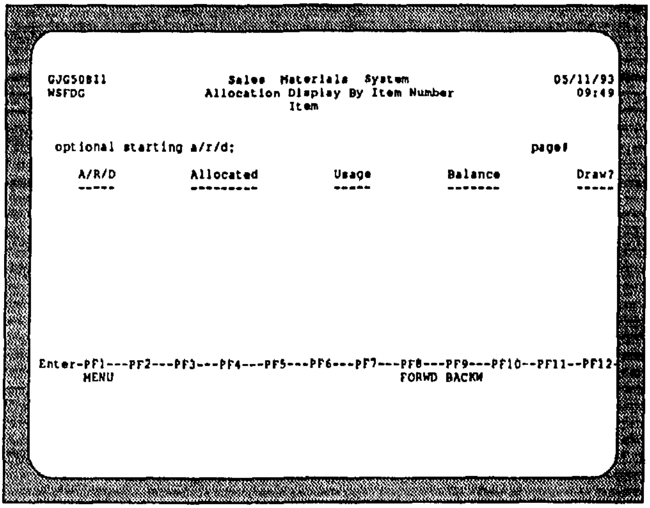
51846 6989

Function 508 - Allocation Search by Item

The SMS system provides for online viewing of selected SMS item allocations.

1. The screen allows the MC to input:

   - The item number of the part/item requested
   - The starting Area/Region or Division — all operating units are listed in numerical order from 1000 up. Select the first operating unit for which an allocation is desired. The computer will list all operating units' allocation from the selected units upward.
   - By allowing the use to view allocations for a given item in any selected operating unit, this mode is useful prior to requesting transfers, etc.



51846 6990

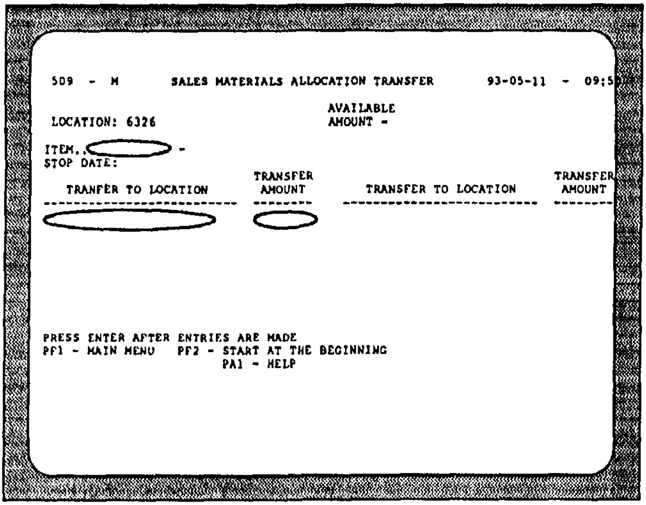
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 509 - Allocation Transfer

When satisfying VAP requirements or handling special requests, it may be necessary to transfer an item from one operating unit to another.

1. Enter the commodity number of the item being transferred. Press [ENTER].
2. The screen indicates the total allocation available to the operating unit.
3. Enter the transfer to location and the quantity — multiple transfers are allowed for a given item.
4. Copies need not be made as the "Allocation Transfer Audit Report" tracks transfers for all items.

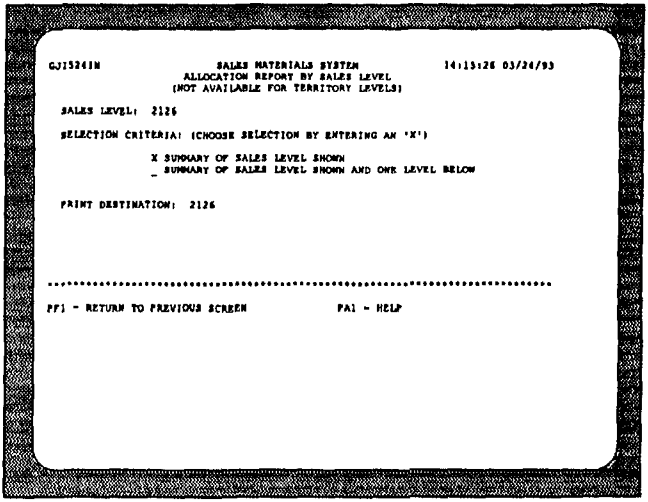


51846 6991

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Function 524 - Allocation Report by Sales Level

1. With the SMS Main Menu displayed, enter 524 in the FN field and press [ENTER]. The following screen will be displayed. Type "X" next to Summary of Sales Level Shown and press [ENTER].



51846 6992

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The report is similar to the following:

GJ102RN ALLOCATION BY SALES LEVEL REPORT

SUMMARY REPORT: 6320 DULUTH DISTRICT

MAJOR CATEGORY: COUPONS ______________________

ITEM	DESCRIPTION	ALLOCATED	USED	REMAINING	ALLOC ABOVE
111111	MAG/STER 350 92 OOC 22407				YES
123456	MAG/STER 92 .35/PK VPR	40	40	36	
123457	MAG/STER 92 .35/PK OPC	2	2	0	
123458	MAG/STER 92 300 VPR	10	10	0	
123459	MAG/STER 92 350 CTN VPR	101	101	0	
234567	CAMEL GN Q2 200/CTN 22054	20	20	0	
234568	DORAL 600/CARTON VPR	10	10	0	
234569	WIN 8B FREE PK BOOK	20	20	0	
345678	VAN 4 QTR 4OCC T-23004	129	129	0	
345679	WIN 4Q 1.5/2 PKS 22816	319	319	0	
456789	DORAL 65 PACK VPR	381	381	41	
456799	DORAL 700 CTN VPR	50	50	23	
567890	MAG/STER 400 CTN VPR	190	190	13	
567891	CAMEL GN 150 OCC 23286	60	60	0	
567892	SALEM 1093 900 2/CTN-300	41	41	0	
567892	SALEM 1093 300/CTN	23	23	0	
567893	WIN 1093 1.5/3 PKS 30027	13	13	0	
567894	WIN .60 VPR 4 Q	27	27	22	
567895	WIN FET 3 OCC 23340	4	4	0	

51846 6993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 6994

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 2
Order/Monitor Fixtures

51846 6995

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ORDER/MONITOR FIXTURES

Preliminary Notes

The MC should not order any merchandising items into the Operations Unit backroom. All merchandising component parts in the backroom should come from old fixtures, excess parts picked up from retail. etc.

Procedures

1. Sales Representatives and management will submit requests for fixture ordering and installation to the Merchandising Coordinator. These work orders will contain the documents necessary to place the order and inform the MC of other information necessary to complete scheduling/installation. This information includes:

   - Store name and address
   - Store contact people
   - Directions to store (if necessary)
   - Indication of type of order being placed and whether attachments are present
   - Special requests (i.e., requested installation dates, times, etc)
   - Schematic of proposed store layout (if necessary)

   This work will be utilized by General Sales Workers to complete installation of fixtures.

51846 6996

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 6997

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Date ____________

Name Stamp

FIXTURE INSTALLATION REQUEST

Store Name & # ____________ SIS # ____________ Chain ID # ____________

Address ____________ Phone # (   ) ____________

City ____________ State ______ Zip ______ Division/Territory ____________

Volume _____ (cpw) Call/Class _____ Store Manager ____________ Contact Person ____________

Directions to Store: ____________

FLEX MERCHANDISERS/COMPONENTS

Brief Detail Description: ____________
(incl. "Security")

Order Forms Attached: ❑ Standard/Special ❑ End Cap w/Wrap ❑ Diagram Modification
❑ E.S.S. ❑ Component Parts ❑ Strike Zone

DORAL PERMANENT FLOOR DISPLAYS (WOOD CARTON MERCHANDISERS)

1' – # L.P. ______ # M.P. ______ # Extenders N/A ______ Security ❑ Yes ❑ No ❑ Only

2 1/2' – # L.P. ______ # M.P. ______ # Extenders ______ Security ❑ Yes ❑ No ❑ Only

3' – # L.P. ______ # M.P. ______ # Extenders ______ Security ❑ Yes ❑ No ❑ Only

' – # L.P. ______ # M.P. ______ # Extenders ______ Security ❑ Yes ❑ No ❑ Only

Side Sign Holders ____________ ❑ Component Parts Order Form Attached – Misc. Components

SPRING LOAD PACKAGE MERCHANDISER

Diagram # ____________ / Quantity ______ Diagram # ____________ / Quantity ______

❑ Retro Flex/SLPM Brief Detail Description: ____________

❑ Component Parts Order Form Attached (MUST for Retro Flex/SLPM Units)

CTR PREFERRED PRESENCE UNITS

Diagram # ____________ (PCD) Diagram # ____________ (Promotional)

❑ Component Parts Order Form Attached – Misc. Components

THIS SECTION TO BE COMPLETED BY DIVISION OFFICE PERSONNEL

Assigned to: ____________ Date Installed: ____________

Total Time Spent Installing: ____________ Drive Time: ____________

Comments: ____________

Reviewed by: ____________ on ____________ To Be Rescheduled: ______ Yes ______ No

Sent to Division(s)/Number ______, ______, ______, on ______ by ______

Supplies to be Taken From Warehouse: ____________

Work Completed Satisfactorily ____________

Store Owner/Manager

51846 6998

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

OVERHEADS

OPM Main (20 col) Structures ______ # OPM Add-on (8 col) Structures ______

☐ Standard Decor ☐ Enhanced Decor ☐ Decor Only # OPM Battery Clocks ______

4' Mini OPM ______ # 6' Mini OPM ______ # Mini Connector Kits ______

☐ Ceiling Installation # Ceiling Mount Kits ______ Leg Placement ______

Counter Extension Kits ______ ☐ Chain Logo Panel ☐ OPM Promo Inser

Description and **DISPOSITION OF OLD** RJR fixtures ______

STANDARD PACKAGE

Specific detail of fixtures and components necessary (by quantity and component part #): ______

MISCELLANEOUS COMPONENTS – MAJOR REPAIR REQUESTS

Detailed Description/Plan of Action ______

Special Diagramming Area:

51846 6999

STORE LAYOUT FOR INSTALLATION/SPECIAL INSTRUCTIONS (be specific) – REQUIRED (1 square = 1 foot)

REQUIRED ATTACHMENTS OR EXPLANATION (YES/NO)

- Plan-O-Gram ______
- Sales Rep Will Tag ______
- Sales Rep Will Install ______
- Contract Agreement Form ______

Store Owner/Manager and R.J. Reynolds Tobacco Company representative have agreed to the package/carton load plans and fixtures indicated.

______ ______
STORE OWNER/MANAGER

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

On receipt of this work order, the MC reviews for discrepancies, gaps or missing information. Additionally, the MC ensures fixture request is appropriate to Region merchandising guidelines:

- Can work be physically accomplished?
- Is work order understandable?
- Are fixtures ordered suited to type and volume of account?

As issues arise, the Region Operations Manager should be consulted. The Region Operations Manager will use experience and judgment to determine whether further information needs to be obtained. If necessary, the Division Manager should be contacted to authorize questionable sets.

❖ *Note:* If management has generated the work order, a review by the MC/Region Operations relative to the appropriateness of the order should not be undertaken. Managers are responsible for understanding Region/Company guidelines.

3. The MC must then determine whether any, or all, of the work order can be satisfied through the utilization of Operations Unit Warehouse component parts. To do this. the MC must understand what items are necessary to fill the order, which can be done by:

   - Accessing function 405 to determine a list of materials needed to complete the order and comparing this list to back room parts
   - Utilizing experience and knowledge

4. After the MC has determined the availability of backroom parts, the order must be filled. In most cases, the SMS 402 function will be used to place the order.

   - It is important when placing an order via the SMS 402 function to ensure the sales representative calling on the account in question is memoed. This is done by entering the employee number at the Order Entry 1 screen.
   - The MC should write the order number on the front of the work order. This information may be needed later.

5. After the order has been placed in SMS, the MC should place the work order in a suspense file entitled "Work Orders Awaiting Shipping Ticket."

6. Each morning, shipping tickets print at the Operations Unit for orders that have been or are soon to be shipped. The MC should take these shipping tickets and match them to the appropriate work order in the "Work Orders Awaiting Shipping Ticket" file.

© R.J. Reynolds Tobacco Company 1993

51846 7000

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- If installation is to be performed by the Operations Unit GSWs, the matched sets should be placed in a file entitled "To Be Scheduled."
- If installation is to be handled by the sales rep or outside sales reps' merchandising specialists, the original work order should be placed in the mail to the proper sales representative.

51846 7001

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7002

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MANAGING BACKROOM INVENTORIES

Summary

The Operations Unit warehouse should serve as the primary location for excess merchandising items and general supplies for the Region and POS/PDI for Divisions operating in the same geographical area. Due to the nature of this centralization, the MC should discuss backroom organization with the Region Operations Manager to customize proper setup.

◆ *Note:* Premiums and Promotions should be sent directly to sales representatives where feasible. Only if absolutely necessary should these items be shipped into the Operations Unit backroom and then, only for personnel who utilize the backroom as a pickup location.

1. The first step towards proper management of an Operations Unit backroom, is to complete an inventory of all items in the warehouse.

    - The MC should establish an inventory book. Inventory bases should be established for general supplies, sales rep supplies, and any POS (if sales personnel pick up at the Operations Unit) utilized by Region personnel on an ongoing basis.

2. Once established, the inventory book should be utilized to:

    - Provide MC with knowledge of parts available to satisfy incoming work orders.
    - Identify overstocked items. If found, send DT to appropriate Operating Units to advise them of availability of excess items.
    - Satisfy requests for excess items from other operating units. The MC will receive these requests via DTs sent by outside Divisions.

3. The MC should review SMS 524 *Allocations by Sales Level* report once per week. The review should involve the identification of new items, supplies which remain in allocation which should be ordered into Operations Unit backroom, etc.

Shipping Guidelines (Incoming/Outgoing)

- MC must coordinate setup of Workstation to utilize when shipping.

PRELIMINARY ACTIVITIES

- Certain supplies must be obtained for shipping utilization:
    - Boxes - all sizes; once boxes are opened, they should not be thrown away but broken down and retained for future use
    - Strapping tape
    - Box cutters
    - Weigh scale
- Contact UPS to set up a daily schedule for pickups and dropoffs.

51846 7003

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- For shipments to an out-of-state location, use the following truck lines for RJR to receive freight discounts:

  - AAA Cooper
  - Carolina
  - Hyman
  - Preston
  - Overnite
  - Yellow
  - Consolidated Freightways
  - Roadway

  These carriers will provide appropriate shipment documentation.

1. Once items to be shipped have been identified, use boxes to pack and label each shipment. When reshipping previously shipped boxes, ensure the original shipping address label is removed and replaced by or covered with the new address label.

2. When using a common carrier, a Bill of Lading must be prepared showing the following information

   - Note 1: Shipper (RJR) and consignee name and address
   - Note 2: Date shipped
   - Note 3: Indicate number of cases shipped per freight classification
   - Note 4: Copy entire freight classification description and add item numbers for items being shipped. These descriptions are as follows:

     National Motor Freight Class Descriptions

     - Rack Store Display EX4 #NMFC 57410 Sub 3
     - Rack Store Display EX4 #NMFC 57410 Sub 6
     - Shelf Brackets - #NMFC 93630
     - Signs - #NMFC176280
     - Clocks - #NMFC 48720
     - Plastic Articles OT Exp - #NMFC 156600 Sub 4
     - Casters - #NMFC 41720
     - Plastic Articles OT Exp - #NMFC 156600 Sub 8
     - Rack Store Display Ex 4 - #NMFC 57410 Sub 5

   - Note 5: Indicate case weight on Catalog items
   - Note 6: All freight charges should be prepared and billed to R.J. Reynolds Tobacco Co, Winston-Salem, NC

51846 7004

© R.J. Reynolds Tobacco Company 1993

EXHIBIT A

SAMPLE BILL OF LADING

DM N. S. McGlamery is shipping from Miami Beach, Florida, to SR J. G. Johnson, Orlando, Florida, the following items: 51846 7005

2-Cases	(2-per case)	Item No. 012609	Freight Description Code: A
1-Case	(1-per case)	Item No. 179879	Freight Description Code: B
2-Cases	(10-per case)	Item No. 129619	Freight Description Code: C

ALWAYS LIST HAZARDOUS MATERIALS FIRST IN DESCRIPTION OF ARTICLES COLUMN

STRAIGHT BILL OF LADING — SHORT FORM — Original-Not Negotiable

RECEIVED, subject to the classifications and tariffs in effect on the date of issue of this Original Bill of Lading.

NOT to be used for ORDER NOTIFY SHIPMENTS. DATE

YELLOW FREIGHT SYSTEM, INC. YFSY

(NAME OF CARRIER) (SCAC)

NOTE: DRIVER AFFIX PRO NUMBER LABEL HERE.

CUSTOMER P.O. NO. | ROUTE | SHIPPER'S NUMBER

TO: CONSIGNEE J. G. Johnson (See Note 1)
On COD Shipments the letters "COD" must appear before consignee's name.
STREET 210 Main Street
(DESTINATION) CITY, STATE, ZIP Orlando, Florida 32800

FROM: SHIPPER R. J. Reynolds Tobacco Company c/o N. S. McGlamery (See Note 1)
STREET 1410 Collins Avenue
(ORIGIN) CITY, STATE, ZIP Miami Beach, Florida 33190

C.O.D. AMT. $ ______ FEE PPD. ☐ COL. ☐ IS CUSTOMER'S CHECK ACCEPTABLE FOR C.O.D.? YES ☐ NO ☐

NO. SHIPPING UNITS	(X) HM	KIND OF PACKAGING, DESCRIPTION OF ARTICLES, SPECIAL MARKS AND EXCEPTIONS (LIST HAZARDOUS MATERIALS FIRST)	WEIGHT (SUBJECT TO CORRECTION)
2		Rack Store Display EX 4#NMFC 57410 Sub-3	76
		(2-Item No. 012609)	
1		Rack Store Display EX 4#NMFC 57410 Sub-6	78
		(1-Item No. 179879)	
2		Shelf Brackets - #NMFC 93560	48
(See		(20-Item No. 129619) (See Note 4)	(See
Note 3)			Note 5)
5		◀ TOTAL TOTAL ▶	202

NOTE - Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property. The agreed or declared value of the property is hereby specifically stated by the shipper to be not exceeding $______ per ______

[illegible] The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.

(Signature of Consignor)

FREIGHT CHARGES
PREPAID ☒ COLLECT ☐
FREIGHT PREPAID EXCEPT WHEN COLLECT BOX ABOVE IS CHECKED.

RECEIVED, subject to the classifications and tariffs in effect on the date of the issue of this Bill of Lading, the property described above in apparent good order, except as noted [illegible]

This is to certify that the above-named materials are properly classified, described, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the Department of Transportation.

SHIPPER: Bill freight charges to R. J. Reynolds
PER: Tob. Co. Winston-Salem, NC 27102
(See Note 6)

YELLOW FREIGHT SYSTEM, INC.
DRIVER TRAILER
PIECES DATE 8/1/91
(See Note 2)

OD-136 (REVISED 10/84) PRINTED IN U.S.A.

MARK "X" IN "HM" COLUMN FOR HAZARDOUS MATERIALS

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Troubleshooting Shipment Problems

1. If shipment is not received within 15 days (30 days Alaska and Hawaii), from the estimated shipment date on the shipping ticket, the MC should notify the Traffic Department:

   (919) 741-1796 Nancy McGlamery
   (919) 741-1795 Clark Golden

2. When shipment is received, each item should be examined for damage or shortage. In the event an item is damaged or shorted, notation should be shown on the freight bill which should then be mailed to the Traffic Department for filing a claim.

   R.J. Reynolds Tobacco Company
   P.O. Box 2959
   Winston-Salem, NC 27102
   Attn: Traffic Department

3. In the event of concealed damage, the carrier should be notified immediately and inspection should be requested. Inspection report, when complete, should be forwarded to the Traffic department for handling.

4. Damaged cases should be refused to carrier or if accepted, carrier should be notified to pick up.

5. Collect freight charges:

   - All POS material is shipped prepaid. Collect freight charges are a result of billing error by the carrier.
   - Send Collect Freight bills to Traffic for handling
   - If a retailer PAYS a collect freight bill, send a copy of the freight bill to Traffic and the account will be reimbursed
   - If a carrier demands on-the-spot payment of charges, contact Traffic immediately.

6. The on-hand notice is mailed to the shipper with a copy to the receiver when a carrier is unable to deliver a shipment due to incorrect or insufficient address, no one at consignee's location to accept material or refusal by consignee to accept material.

   - Arrange locally with the carrier for a convenient time to make delivery or advise Traffic.
   - If order is for a retail outlet and is undeliverable, Traffic will reconsign to the appropriate Division Office automatically, Any extra charges should be billed to Traffic.

51846 7006

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7007

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7008

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

SCHEDULING INSTALLATIONS

Preliminary Activities

The MC and Region Operations Manager should discuss:

- Size of the installation work force reporting to MC
- Geographic boundaries of work performed by Operations Unit installers
- Guidelines relative to size and type of fixtures which will be installed by Operations Unit personnel
- Developing and maintaining a scheduled GSW availability

Procedures

1. Refer to the "To be Scheduled" file. Prioritize each work order based on:
   - Chain commitments
   - Dates requested
   - Urgency of work order
   - Size of fixture set
2. Refer to the schedule of part-time merchandising specialist availability (which days, what hours available, etc.).
3. Develop calendar to indicate days/times for specific jobs and personnel assigned to job.
   - Use knowledge of personnel availability and job size to ensure appropriate people are assigned to the job.
   - Calendar can be weekly or biweekly.
4. MC should call store managers of affected accounts prior to installation to verify that the dat and time scheduled are satisfactory. If necessary, make changes to scheduling calendar.
5. Notify affected sales representatives via voice-mail prior to installation.
6. Merchandisers handle installations on day scheduled. On completion of each job, MC must instruct merchandisers to have store managers sign work order if satisfied with work or to make comments.
7. It is not necessary to return tools and tags each day, unless the size of the Merchandising department requires it.

Tracking Installation Efficiency

It is important for the MC to evaluate the scheduling of all installations and look for areas in which to improve. This can be accomplished by tracking installations and how often the job is completed correctly THE FIRST TIME. Inefficiencies often show up when extra trips need to be made to return to stores and complete jobs, modify originally fixture sets, etc. All of these activities take time, money and people to accomplish objectives which should have been reached the first visit.

51846 7009

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Procedures

1. Use the following form to complete the tracking. This form should be utilized on an ongoing basis to maintain up-to-date information.

RACK INSTALLATION EFFICIENCIES TRACKING FORM						
	DIV #	STORE NAME	W/O DESCRIPTION	DONE DATE	RE-CALL DATE1	RE-CALL DATE2

51846 7010

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 5
Field Supply Requests

51846 7011

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

FIELD SUPPLY REQUESTS

Summary

Supply requests are any forms submitted by sales personnel and used by the Operations Unit to process various sales rep needs. These specific supply request forms can be used by the Operations Unit.

- GENERAL SUPPLY REQUEST - Font #s, POS, PDI, facsimiles, temp displays.
- SYSTEMS ADMINISTRATIVE REQUEST - Reports, contracts, draft books.
- COUPON/VPR REQUEST - Coupons, VPRs.

Procedures

The MC is responsible for processing General Supply Requests.

1. Sales Reps submit supply requests (see example in setup section).
2. Request by request, the MC fills each order.
   - MC reviews backroom inventory and ships available requested items from on hand stock. Write BR next to each item shipped from back room.
   - All remaining items should be ordered via SMS 402. Notation of "WS" should be written next to all items ordered from Winston-Salem.
   - Any item not available through on hand stock or SMS needs to be ordered via appropriate local suppliers (i.e., dusters, notebooks, staplers).
   - If any item is unavailable, a note to this effect should be written on the form. Also indicate whether the Supply Request will be held until the out-of-state item is available or whether the sales rep should re-request at a later date.
3. On completion of processing, the following should be noted on the Supply Request:
   - COMPLETED should appear on form
   - Date of processing
   - Initials of processing employee
   - SMS order number
4. Return supply request to originator. No copies are necessary.

51846 7012

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7013

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 6
Managing Fixture Refurbishing

51846 7014

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MANAGING FIXTURE REFURBISHING

Summary

One of the benefits to the Operations Unit of centralizing the merchandising department is to allow for better efficiency through the reuse of old or used component parts. As stated previously, the Operations Unit is the main storage location for all returned, misordered, excess, or old fixtures and components.

Many of these items can be refurbished, cleaned up, and reused. Each use of one of these items means that the same item does not have to be ordered NEW via SMS. Therefore, reused items result in $$$ savings by more efficiently utilizing available resources.

Procedures

The MC has two primary accountabilities in this area - refurbishing old, used or damaged items and tracking the financial savings achieved.

1. Any time a backroom component or fixture is utilized in place of ordering a new item via SMS, a monetary savings occurs. The MC needs to monitor this savings in one of two ways.

   - SMS function 210 - This function allows the MC to input the commodity number of the item utilized. The SMS system will produce, online, the $$$ value of the item.

   - SMS function 405 - List of Materials. This function allows the MC to input the DIAGRAM number of the fixture utilized. The SMS system will produce, online, the $$$ amount of the fixture.

2. These two functions should be utilized daily and all pertinent information noted on the following form.

51846 7015

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RACK BUDGET EFFICIENCIES TRACKING FORM

STORE NAME	BACKROOM PARTS USED TO COMPLETE WORK ORDERS	COST OF PART $$	TOTAL $$$ SAVED FOR JOB

Each month, the MC should submit to the Region Operations Manager the total dollars savings through proper utilization of back room component parts.

51846 7016

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7017

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

SUPERVISING GENERAL SALES WORKERS

Summary

The MC is charged with overseeing the performance of the General Sales Workers involved in outside installations and backroom work.

Supervision of Outside Merchandising Specialists

1. The MC should review the weekly schedule to determine whether jobs are being completed in a timely fashion.
   - Spot check "comments" section of work order.
   - Spot check "completion date."
2. The MC should also review quality of work being performed at retail installations.
   - The best review is accomplished by physically visiting an installation while it is occurring or shortly afterward (1 hour to 1 day). The MC can then see what store personnel, RJR reps, and customers see and properly evaluate the installation.
   - Periodically, the MC should seek comments from sales reps and managers. While the MC will often be approached with these comments, it is wise to pursue these opinions before they become issues large enough for reps and managers to call with concerns.
3. The MC should be alert to the expertise of each Merchandising Specialist regarding specific-type installations. A periodic sit down or even casual talk with subordinates while working in the back room can bring to light areas where greater knowledge or experience is needed.
4. If problems arise, the MC can attempt to discuss these concerns with the affected personnel. If the situation is not addressed and corrected by the subordinate, the Region Operations Manager should be contacted by the MC and the issue discussed.

Supervision of Backroom Personnel

Obviously, the organization of the Operations Unit backroom is critical to the proper administration of this Operations Unit. The MC should ensure backroom personnel stay busy.

If desired, the MC can formulate a standard weekly schedule for backroom personnel. This schedule can organize each day by the type of activities that will take priority on that day (i.e., Tuesday, Friday — General Outgoing Shipments, Wednesday — Backroom Cleaning, Monday — Filling Supply Requests, etc.).

51846 7018

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7019

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7020

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

OFFICE SUPPLIES AND HANDHELD COMPUTERS

Maintaining Office Supplies

The Materials Coordinator is accountable for ensuring that the Region Operations Unit is adequately and reasonably stocked with necessary administrative supplies.

1. The MC should establish and organize a location to maintain needed supplies, such as:
   - Copier paper
   - RJRT letterhead paper for each Division in Region
   - Envelopes
   - Files and manilla folders
   - Other assorted items, such as paper clips, legal paper, notebooks, etc.
2. The MC should establish an inventory base based on project usage of each item.
3. Once a month (or as needed), the MC should review current stocks of each item and order adequate quantities to satisfy realistic needs of the Region Operations Unit.

Tracking Handheld Computers

Handheld computers are a valuable and necessary part of a sales rep's position with RJR. Because of their high value, it is important to properly track and monitor each computer assigned to a given operating unit. The computer's components must be tracked individual, as each is requested, repaired and replaced individually. The handheld system provided for rep usage consist of:

- Handheld computer
- Modem
- Power supply

Preliminary Activities

- The MC must set up and utilize a Handheld Log to track all parts. Certain information must be included in the log:
  - Date component received
  - Date issued to sales personnel
  - Name of person component assigned to
  - H/H, modem and power supply serial numbers
  - Date returned to FASTECH

Problems With Handheld Component Parts

1. Because of the age of current handhelds, problems with their operation are becoming more and more frequent. When issues arise, sales reps will often call the Operations Unit for instruction.
   - Reps should be instructed to call Fastech at 1-800-227-4242.
   - Operators will be standing by to field questions re: problems with any of the computer component parts.

51846 7021

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Operator will inform rep to send defective component back to Fastech prior to operations unit issuing a replacement.

2. If a problem has been identified which requires the return of certain component parts, the following steps should be taken.

   a. Rep calls operations office and requests a component part.

   b. Operations office sends replacement to rep with a shipping ticket enclosed as follows:

      Fastech, Inc.
      Attn: Service Center
      450 Parkway Drive
      Brommall, PA 19008

   c. Rep sends defective component part to Fastech utilizing shipping ticket sent with replacement.

   d. Fastech notifies Division via DT that a replacement will be sent. This communication will include the new serial number.

   e. When replacement is received by operations office the serial number and date received are logged in. It is not necessary to insure the handheld.

51846 7022

© R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7023

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Summary

Company vehicles are provided to employees for use in the performance of their accountabilities. The vehicle is the most expensive piece of equipment furnished the employee. The MC will be the information source at the Operations Unit for driver/vehicle inquiries, will work closely with management to ensure compliance with established procedures, and will ensure accurate and timely entry of driver/vehicle information in the Car Master System and the Sales Expense System. In addition to this manual, the MC should become familiar with the Company Vehicle Section of the Policy and Procedure Manual and be knowledgeable of the Car Master System.

Inquiry by Division

The MC may view a list, by Division, of all vehicles assigned to the Division. This list is available on-line as a reference tool to answer basic questions. All on-line information should be the most accurate and current.

To view this listing, perform the following steps:

1. Place an "X" beside Sales Expense and press [ENTER].

```
GHCMO1MN                  SALES INFORMATION SYSTEM          06/18/92  15:53:3
                          APPLICATION SELECTION MENU
                          MASTER LIST
                          MANAGEMENT SUMMARIES
                          CHAIN HEADQUARTERS
                          PAYMENT SYSTEMS
                          PRINT REPORT


                          HAND-HELD MESSAGES
                          DOCUMENTATION TRANSPORTER

                          SALES LEVEL SHIPPING ADDRESS
                          BUSINESS INFORMATION
                       X  SALES EXPENSE
                          LABOR REPORTING
                          SALES MATERIALS

PLACE AN  X  NEXT TO ONE OPTION.

PRESS THE PF1 KEY TO LEAVE THE SALES INFORMATION SYSTEM.
```

51846 7024

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. Type 11 at the prompt to select "Car Master System" and press [ENTER].

```
GFJ000MN        F I E L D   S A L E S   E X P E N S E          06/24/92
                     FIELD OFFICE MAIN MENU

                 1). START A BATCH
                 2). RESTART A BATCH
                 3). DELETE A BATCH
                 4). PRINT A BATCH
                 5). APPROVE A BATCH FOR PAYMENT
                 6). CHANGE AN EXPENSE REPORT
                 7). DELETE AN EXPENSE REPORT
                 8). VIEW/PRINT EXP RPT INSTRUCTIONS
                 9). SALES EXPENSE CODE INQUIRY
                10). SALES ANALYSIS CODE INQUIRY
                11). CAR MASTER SYSTEM
                12). PAYMENT HISTORY (A/P)
                13). BATCH CONTROL INQUIRY
                14). EMPLOYEE MASTER INQUIRY
                15). PERSONAL/COMMUTING MILEAGE INQUIRY
                98). RETURN TO SALES INFORMATION

                ENTER SELECTION FROM ABOVE: 11
```

3. Type 1 at the prompt to select "Car Master Inquiry."

```
CRM072MN        V E H I C L E   R E P L A C E M E N T          06/24/92

                 SPECIFY DUE DATE 021492    REMAINING SPECIFY DAYS
                 1). CAR MASTER INQUIRY
                 2). CHANGE VEHICLE ASSIGNMENT
                 3). NEW VEHICLE (PRESPEC) DESCRIPTION
                 4). NEW VEHICLE (PRESPEC) DESCRIPTION PRINT
                 5). REQUISITION VEHICLE
                 6). CANCEL REQUISITION
                 7). CHANGE VEHICLE REQUISITION
                 8). REQUISITION INQUIRY
                 9). REQUISITION PRINT
                10). CONFIRM QUOTE
                11). QUOTE INQUIRY
                12). QUOTE PRINT
                13). DELIVERY/DEALER INQUIRY
                14). ASSIGN DRIVER UPON DELIVERY
                15). SPECIAL ACCESSORIES BY STATE INQUIRY
                16). NOTE INQUIRY
                17). NOTE ADD
                99). RETURN TO FIELD OFFICE MAIN MENU
                SELECT FUNCTION FROM ABOVE: 1_          REGDIV XXX7
```

51846 7025

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. This screen allows for selection of vehicles by a variety of different criteria. For the purposes of obtaining this preliminary information, enter the desired Division number in the appropriate blank and press [ENTER].

```
CRM315IN            C A R   M A S T E R   I N Q U I R Y            06/24/92
                            SELECTION CRITERIA

        REGDIV: 2236  YEAR: __  GRP:
        MAKE: _____  STYLE: _____  CLASS: ___  STATUS: ___  STATE: __

                         - OTHER INQUIRY TYPE -

        CAR NUMBER......: ____
        SERIAL NUMBER...: _ _______________
        SOCIAL SECURITY.: _______
        EMPLOYEE NUMBER.: ______

        ***TO TERMINATE, PRESS ENTER WITH NO DATA IN FIELDS***
```

51846 7026

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The screen will highlight a "master list" of all vehicles assigned to the requested Division. Included will be the driver's account number and name, year, make, style, class, current mileage status, current Division to which the vehicle is assigned, previous Division (if there was one) to which the vehicle was assigned, and license plate number and state.

```
CRM320IN           C A R   M A S T E R   I N Q U I R Y             06/23/9
                               MULTI-SELECTION
 SEL: REGDIV/:2236|**|***|*****|*****|***|***|**

 CAR#    ACCOUNT  EMP NAME L/O YR MAKE   STYLE CLS   MILES  R/D PREV    LICENSE
13265             DIV OFFICE L  87 FORD   CARGO VAN   41995 2236 2332
14079      37514  PAJERSKI E L  88 CHEV   BVLLE VAN   67495 2236
14361 *           REGULAR SO L  88 CHEV   CAPCL SED   43940 2236
14570      73130  HANCOCK RU L  88 CHEV   BVLLE VAN   75445 2236
15673     829487  WHITE MELI L  89 FORD   CVS   SED   50613 2236 4529
15852 *           REGULAR SO L  89 FORD   CVS   SED   68273 2236
15951             DIV OFFICE L  89 CHEV   RESRT VAN   57440 2236
16438             POSS SURP/ L  89 FORD   CVS   SED   54643 2236
17684      78062  SLAUGHTER  L  90 CHEV   PASTR VAN   47110 2236
17691 *           REGULAR SO L  90 CHEV   BVLLE VAN   81275 2236
17752      72687  EVANS RONA L  90 DODGE  DYNS  SED   43400 2236
17921             VACANT PEN L  90 CHEV   ASCSR VAN   46710 2236 2228
17923      77240  HOPKINS SA L  90 CHEV   ASCSR VAN   24992 2236
17924      77241  HOFFMAN MA L  90 CHEV   ASCSR VAN   21048 2236
18469      77418  JENKINS TY L  90 CHEV   PASTR VAN   22554 2236

ENTER DESIRED CAR NUMBER: 15673     TERMINATE LIST? (Y=YES,DEFAULT=NO): _
```

6. If desired, an individual vehicle inquiry can be performed by entering a specific vehicle number in the blank. Press [ENTER] to scroll forward to other vehicles or press "Y" at the prompt to return to the selection criteria screen.

51846 7027

Copyright © R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Inquiry by Vehicle

7. If the MC has chosen to view individual car data, the following "Individual Selection" screen will be displayed. It shows the most recent ending mileage information, serial numbers, and other vehicle-specific information as a quick reference to answer inquiries.

```
CRM325IN          C A R   M A S T E R   I N Q U I R Y              06/23/92
                         INDIVIDUAL SELECTION

 SEL: REGDIV/:2236|**|***|*****|*****|***|***|**

 CAR# R/D L/O YR MAKE  STYLE CLS GRP  SERIAL NUMBER      PREV PERMIT STATUS
15673 2236 L  89 FORD  CVS   SED  10 2FABP72F8KX131511   4529   0122   200

LICENSE NO  LICENSE STATE

ACCOUNT EMPLOYEE NAME              CITY           ST --- SELLING ---  REPLACES
                                                         PRICE   DATE     CAR
 829487 WHITE MELISSA D           COLUMBIA        SC
                          REPLACED BY                  -- MAINTENANCE CARD --
PURCH DATE LAST CHANGE   CAR   DATE              ADD DATE  DEL DATE  MESSAGE
   890117     920601
PREV EMP  PREV EMP       M/E        END        M/E       END        M/E       END
  ACCT   LAST CHANGE     DATE       MILES      DATE      MILES      DATE      MILES
 0077514   911029      03/01/92        1
                       05/10/92   50,115
                       06/07/92   50,613
```

```
CRM315IN          C A R   M A S T E R   I N Q U I R Y              06/23/92
                         SELECTION CRITERIA

        REGDIV: 2236____  YEAR: __  GRP: ___
        MAKE: _____ STYLE: _____ CLASS: __  STATUS: 220  STATE: SC

                       - OTHER INQUIRY TYPE -

        CAR NUMBER......: _____
        SERIAL NUMBER...: _ _________________
        SOCIAL SECURITY.: _________
        EMPLOYEE NUMBER.: _______

        ***TO TERMINATE, PRESS ENTER WITH NO DATA IN FIELDS***
```


Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Inquiry by Status Code

1. At the Selection Criteria screen, after REGDIV:, type the applicable Division number. Tab to STATUS and type "220" or "230". Tab to STATE:, type the applicable two-character state abbreviation, and press Enter. A list of vacant and/or surplus vehicles to be used in lieu of renting will appear.

At the Selection Criteria screen you may also perform vehicle inquiries by car number, serial number, Social Security number or employee number. A complete (or even partial) serial number can be entered and the system will identify the vehicle. If using a partial serial number, at SERIAL NUMBER, type "*", then the partial number. This function can be used to identify vehicles for license renewals, parking tickets, etc.

Status Code Definitions

Additionally, every Company vehicle is assigned a status code, which changes as the status of the vehicle changes. The MC should become familiar with the following codes as they are referred to in this section and vehicle correspondence.

Code	Description	Definition	Updated By
100	Regular sold	Sold by leasing company via wholesaler	Fleet Operations
110	Employee sale	Sold to RJRT employee or to third party via ValueBuy program	Fleet Operations
120	Total loss	Disposed of for salvage - insurance settlement finalized	Fleet Operations
130	Stolen/unrecovered	Stolen/not recovered within 30 days - insurance settlement finalized	Fleet Operations
200	Individual assigned	Assigned to employee authorized to have Company vehicle	Field Sales
210	Division Office assigned	Assigned to Division Office for use by various employees for rack installations; Region Office has designated authorized allotment for each Division; increase requires Area Office approval and update of table by Fleet	Field Sales and Fleet Operations
220	Vacant pending replacement	Updated automatically in Car Master System;when employee is inactive in HRIS,	Field Sales and Fleet Operations

51846 7029

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

		vehicle becomes vacant; Fleet will work with Field Sales personnel to determine disposition of vehicle; if true vacancy exists, Field Sales will be accountable for assigning a driver using the 200 code and employee number	
230	Surplus/no headcount	Vehicle unnecessary; Field Sales Management wants Fleet to dispose of vehicle or use it elsewhere	Fleet Operations
235	Being transferred/ reassigned	Vehicle designated for transfer/reassignment; Fleet will assign 235 code, but Field Sales is accountable for changing code to 200 or 210 when vehicle arrives in Division	Fleet Operations and Field Sales
240	Pickup notice	Fleet requests leasing company to pick up vehicle for disposal	Fleet Operations
250	To be sold	Vehicle left at dealership for wholesaler to pick up (or employee/third party is purchasing); trade-in unit is automatically updated when new unit is assigned to driver	Fleet Operations
260	Wreck/pending resolution	Vehicle declared total loss; insurance settlement pending	Fleet Operations
270	Stolen/pending resolution	Fleet is aware vehicle is stolen; must wait 30 days before replacing or making insurance settlement	Fleet Operations

Changing Vehicle Assignment

From time-to-time, Division management may decide to change vehicle assignments. Following are the steps to accomplish this task. More than one vehicle change may be made at a time and a change *must* be made when vehicles are switched among drivers.

Changing vehicle assignments allows the Operations Unit to control and enter assignment changes for active vehicles that are assigned to an employee, designated as Individual assigned (200), Division Office assigned (210), Vacant pending replacement (220), or Being transferred/reassigned (235).

51846 7030

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Vehicle assignment changes can only occur within a Division. Transfers between Divisions must be processed by Fleet Operations — the MC should contact them as appropriate in these cases.

To change a vehicle assignment:

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 2 and press [ENTER].

```
CRM057UN           C A R   M A S T E R   S Y S T E M              06/24/92
              REGDIV 2236 COLUMBIA
(C)  CAR#   YEAR     MAKE   STYLE CLASS   **  STATUS/DRIVER/LICENSE  ***
c_  14079   88       CHEV   BVLLE  VAN    200        INDIVIDUAL ASSIGNED
                                          0037514    PAJERSKI E L

_   14570   88       CHEV   BVLLE  VAN    200        INDIVIDUAL ASSIGNED
                                          0073130    HANCOCK RUSSELL R

_   15673   89       FORD   CVS    SED    200        INDIVIDUAL ASSIGNED
                                          0829487    WHITE MELISSA D

c   17684   90       CHEV   PASTR  VAN    200        INDIVIDUAL ASSIGNED
                                          0078062    SLAUGHTER ANDREW T

_   17752   90       DODGE  DYNS   SED    200        INDIVIDUAL ASSIGNED
                                          0072687    EVANS RONALD E

_   17923   90       CHEV   ASCSR  VAN    200        INDIVIDUAL ASSIGNED
                                          0077240    HOPKINS SANDRA M

ENTER UPDATE      PF3 MENU         PF7 PAGE BACKWARD   PF8 PAGE FORWARD
```

2. At the Car Master System screen, [TAB] to each specific vehicle to be changed and type C in the first column. The cursor will automatically tab to the STATUS/DRIVER/ LICENSE column. (By deleting the c from the first column, status and driver information will automatically reappear.)

3. Enter the status code 200 for vehicles assigned to an individual or 210 for vehicles assigned by the Division Office.

4. If status code 200 was entered in step 2, type the new driver's account number, vehicle license plate number and license state (e.g., EKL54_SC or type the word unknown if license information is not available at time of entry), and press [ENTER]. If status code entered was 210, delete the employee/account number if it exists and press [ENTER]. The [ENTER] key updates the information.

51846 7031

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Example:

To swap vehicles between E. L. Pajerski and Andrew T. Slaughter, type c in front of each car number in the first column. At STATUS/ DRIVER/LICENSE, change their employee numbers, and press [ENTER]. Screen will show new drivers, employee numbers, license plate numbers, and states.

◆ *Note:* If vehicle status is changed from 200 to 210, information will resort.

IMPORTANT: Your Region Office has designated an authorized vehicle allotment for each Division. An increase requires Region Office approval and table update by Fleet Operations. If you exceed the allotment, you cannot assign the vehicle to a Division until the Region Office has been in contact with Fleet.

New Vehicle (Prespec) Description

This function lists each Prespec (vehicle description) number and indicates eligible job codes.

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 3 and press [ENTER].

```
CRM092UN            V E H I C L E   R E P L A C E M E N T              06/24/92
                           REGDIV 2236 COLUMBIA
                        1992 NEW VEH BY JOB CODE

JOB                                            PRESPEC NO.
CODE        JOB DESCRIPTION           A   B   C   D   E   F   G   I   J
----- ------------------------- ------------------------------------

14021 RETAIL REP                008 014 006 010 019 020
14043 SALES REP                 008 014 006 010 019 020
14053                           008 006 020
14056                           008 006 020
14057 SALES REP TEMP            008 006 020
14066 TERRITORY REP             008 014 006 010 019 020
14075 AREA SLS REP              008 014 006 010 019 020
14304 ALASKA SALES SUPERVISOR   008 014 006 010 019 020
14305 SR AREA SLS REP           008 014 006 010 019 020
14320 SPEC RES MGR              028
14326 SPEC ACCT MGR             028
14328 DIV T&D MGR               028
--------------------------------------------------------------------------------
SELECT PRESPEC FOR INQUIRY  --> 014        PF4 MENU                PF7 BACK
                                           PF5 NEW VEH BY PRESPEC  PF8 FORWARD
```

51846 7032

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. At the *1992 New Veh By Job Code* screen, after SELECT PRESPEC FOR INQUIRY PROMPT, type your selection and press [ENTER]. The screen will display standard equipment for your selection.

```
CRM086UN           V E H I C L E   R E P L A C E M E N T           06/24/92
                              STANDARD EQUIPMENT
MODEL PRE SPEC
YEAR    CODE   MAKE  STYLE CLASS MANUFACTURER CYLINDERS
1992     14    FORD  C.WAG  VAN  FORD               8

          1 FORD W/2ND SEAT CLUBWAGON XLT
          2 MODEL                             E11705A
          3 WHEELBASE                         138.0
          4 GVW RATING                        6700
          5 NO. OF PASSENGERS                 5
          6 TRIM PKG.                         XLT
          7 ENGINE AUTHORIZED                 5.0L/V-8 99N
          8 AUTOMATIC TRANSMISSION W/OD       STANDARD 44T
          9 HIGH CAPACITY A/C FRONT & REAR 574
         10 HOOD RELEASE                      STANDARD

    PF4 MENU                                       PF7 BACKWARD
    PF3 NEW VEHICLES BY PRESPEC                    PF8 FORWARD
    PF5 NEW VEHICLES BY JOB CODE                   PF9 COLORS
```

51846 7033

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. At the Standard Equipment screen, press [PF3] to see new vehicles by Prespec screen. Follow screen prompts for additional information.

```
CRMOBSUN              V E H I C L E   R E P L A C E M E N T          06/24/92
                            REGDIV 2236 COLUMBIA
                         1992 NEW VEHICLES BY PRESPEC

PRE                                             JOB CODES
SPEC MAKE  STYLE CLASS   A     B     C     D     E     F     G     H     I
---- ----- ----- ----- -----------------------------------------------------

025  MERC  GH LS SED
028  FORD  TAUR  SED   14320 14326 14328 14330 50540 50060 72111 72112 72119
                       14364 14367 14370 14350 14361 14365 70215 14110
032  DODGE DYNS  SED   14350 14361 14365
042  MERC  GHARQ SED   14360 50205 72086 86049 70596
064  FORD  CRVIC SED   14360 50205 72086 86049 70596
065  CHRYS SALON SED   14360 50205 72086 86049 70596
066  PONT  BONNE SED
070  TOYO  CAMRY SED   14350 14361 14365
078  JEEP  CHE   TRK
082  ACURA LED   SED
083  MAZDA 929   SED
-----------------------------------------------------------------------------
SELECT PRESPEC FOR INQUIRY  --> ___          PF4 MENU               PF7 BACK
                                             PF5 NEW VEH BY JOB CODE PF8 FORWAR
```

43. After SELECT PRESPEC FOR INQUIRY: prompt, type the Prespec number to acquire the Standard Equipment screen.

51846 7034

Copyright © R.J. Reynolds Tobacco Company 1993

5. At the Standard Equipment screen, press [PF9] to see colors.

```
CRM090UN             C A R   T A B L E   U P D A T E              06/24/92
                             COLORS BY PRESPEC
  MODEL PRE SPEC
  YEAR    CODE   MAKE  STYLE CLASS MANUFACTURER CYLINDERS
  1992  14    FORD  C.WAG  VAN  FORD              8
                EXTERIOR COLOR                INTERIOR COLOR
             1 MEDIUM MOCHA MET (DC)____  MOCHA (DP)__________
             2 CURRANT RED (EC)_________  DARK CHARCOAL (DJ)______
             3 CRYSTAL BLUE METLC (HA)__  CRYSTAL BLUE (DB)_______
             4 _________________________  ________________________
             5 _________________________  ________________________
             6 _________________________  ________________________
             7 _________________________  ________________________
             8 _________________________  ________________________
             9 _________________________  ________________________
            10 _________________________  ________________________
            11 _________________________  ________________________
            12 _________________________  ________________________
            13 _________________________  ________________________
            14 _________________________  ________________________
            15 _________________________  ________________________
              PF4 MENU                   PF7 BACKWARD
              PF3 PREV SCREEN            PF8 FORWARD
```

6. Available colors are listed. When requisitioning a new vehicle, use the numbers listed on the left to indicate your exterior/interior color choice.

7. Press [PF4] to return to Vehicle Replacement screen.

Printing Prespec Vehicle Descriptions

To print Prespec vehicle descriptions for the driver:

1. At the Vehicle Replacement screen after SELECT FUNCTION FROM ABOVE: prompt, type 4 and press [ENTER]. You will have two print options.

2. To print specifications/colors for *all* available Prespecs, press [PF1]. To print specifications/colors for a specific Prespec, type the Job Code number after SELECT JOB CODE FOR PRINTING and press [ENTER].

Requisitioning a Vehicle

Before requisitioning a vehicle, read the following information.

Driver-Paid Options

The driver can request and pay for extra options not outlined on the approved vehicle specifications. However, driver-paid options will be reviewed by Fleet Operations for approval and no driver-paid options are authorized for vans.

51846 7035

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Non-approved driver-paid options include the following:

Model changes	Interior upgrades
Sunroof	Unauthorized power-assisted options
Engine size	Special paints

Cost of driver-paid options is not available to Fleet until the new model year vehicles have been introduced to the public by the manufacturer. Fleet will notify the driver of the amount owed as soon as possible. Checks should be made payable to R. J. Reynolds Tobacco Company before taking delivery and forwarded to your Fleet Coordinator.

Alarms

Alarms should only be requested for Sales Representative vehicles used in high-risk assignments. Region Operations Manager approval to Fleet (verbal or written) is required *before* Fleet releases the order.

Retention of Trade-In Vehicles

Trade-in vehicles may only be kept if Fleet is notified before driver takes delivery of the new unit. Your request will be reviewed and a decision made based on headcount information provided by the Region Office.

Division Office assigned vans do not have to be replaced when eligible. Fleet policy is to utilize a Sales Representative van in good condition with low mileage and eligible for replacement and to trade in the high-mileage Division Office van. (Briefly, to accomplish this procedure, access Function 6 to cancel the Sales Representative van. Access Function 5, select the vehicle number for the old Division Office van, specify the average weekly miles for the Sales representative, specify the Sales Representative's account number as the different driver, and follow remaining prompts.)

General Information

Vehicles cannot be kept in service as spares to avoid rental costs. Fleet will make every attempt to accommodate vehicle needs for your Division; however, it is not cost effective to keep spare vehicles. The number of Division Office assigned vehicles should support rack installation requirements. Division Office allotments are approved by the Region Office.

After a vehicle has been specified or canceled, changes can only be made the same day. What you specify or cancel will be released to Fleet that night. If you have changes after processing, contact your Fleet Coordinator.

Entering a Requisition

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 5 and press [ENTER].

   An announcement indicating vehicles eligible for replacement will automatically print at your Division. Divisions that do not have any vehicles

51846 7036

eligible for replacement will be notified via the Documentation Transporter.

You will have a 3-week period in which to select and enter the requisition into the system.

```
CRM073UN            V E H I C L E   R E P L A C E M E N T            06/24/92
                                  REQUISITION
                            REGDIV 2236 COLUMBIA
                   VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
     *********** OLD ***********    ************** NEW **************
SEL  VEHICLE                          VEHICLE DELIVERY
     NUMBER  STATUS                   NUMBER     DATE  STATUS
 x   15331 REL FOR SPEC
     14361 TO BE SOLD                  20861    92 04  DELIVERED
     14570 REQUISITIONED               20862
     16438 CANC  SALES
     20860 REQUISITIONED  NO TRADE     20860



        PF4 MENU                 PF7 BACK         PF8 FORWARD
```

1. At the Requisition screen, type x in front of the vehicle number you wish to select and press [ENTER].

2. Follow screen prompts.

Canceling a Requisition

Cancel a requisition when you want to keep a low-mileage Sales Representative vehicle in service, to accommodate approved planned headcount reductions, to correct driver information or change Prespec number information for an already specified vehicle.

Canceled requisitions require a note to Fleet explaining the reason for the cancellation.

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE prompt, type 6 and press [ENTER].

51846 7037

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
CRM073UN            V E H I C L E   R E P L A C E M E N T            06/24/92
                                  CANCEL
                          REGDIV 2236 COLUMBIA
                 VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
       *********** OLD ***********    ************** NEW **************
SEL  VEHICLE                           VEHICLE DELIVERY
     NUMBER  STATUS                    NUMBER    DATE   STATUS
 x    15331 REL FOR SPEC
      14361 TO BE SOLD                  20861    92 04  DELIVERED
      14570 REQUISITIONED               20862
      16438 CANC  SALES
      20860 REQUISITIONED  NO TRADE     20860



        PF4 MENU                  PF7 BACK          PF8 FORWARD
```

2. At the Cancel screen, type x in front of the vehicle number you want to cancel and press [ENTER].

Changing a Requisition

If a driver or Prespec number must be changed, correct it by accessing Function 6 and canceling the requisition. Next, access Function 5, enter the requisition again, and follow prompts.

If the driver or Prespec number is correct but you have other changes, access Function 7, select the vehicle, select the appropriate change function number, and follow the prompts:

2 AVERAGE WEEKLY MILEAGE (OLD VEHICLE INFORMATION)
6 COLORS
7 DRIVER-PAID OPTIONS
8 SPECIAL ACCESSORIES
9 SPECIAL DELIVERING DEALER

To change a requisition:

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 7 and press [ENTER].

51846 7038

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
CRM073UN           V E H I C L E   R E P L A C E M E N T          06/24/92
                                  CHANGE
                          REGDIV 2236 COLUMBIA
               VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
      *********** OLD ***********    ************** NEW *************
SEL  VEHICLE                          VEHICLE DELIVERY
     NUMBER  STATUS                   NUMBER    DATE  STATUS
 x    16040 SPECIFIED
      14361 TO BE SOLD                 20861    92 04 DELIVERED
      14570 REQUISITIONED              20862
      16438 CANC  SALES
      20860 REQUISITIONED   NO TRADE   20860



        PF4 MENU                  PF7 BACK        PF8 FORWARD
```

2. At the Change screen, type X in front of the vehicle number you want to change and press [ENTER].

3. Follow screen prompts to change requisition information.

51846 7039

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Requisition Inquiry

To inquire about a requisition:

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 8 and press [ENTER].

```
CRN073UN          V E H I C L E   R E P L A C E M E N T           06/25/92

                                INQUIRY
                          REGDIV 2236 COLUMBIA
                 VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
     ************ OLD ************    *************** NEW **************
SEL  VEHICLE                            VEHICLE DELIVERY
     NUMBER  STATUS                     NUMBER    DATE   STATUS
      14361 TO BE SOLD                   20861   92 04  DELIVERED
 x    14570 REQUISITIONED                20862
      16438 CANC  SALES
      20860 REQUISITIONED  NO TRADE      20860



        PF4 MENU                  PF7 BACK        PF8 FORWARD
```

2. At the Inquiry screen, type x in front of the vehicle number you want to inquire about and press [ENTER]. The system will provide you with detailed information concerning the requisitioned vehicle.

Printing a Requisition

Keeping a hardcopy is totally at the discretion of each MC. Requisition information will remain online until the new vehicle has been flagged as delivered and assigned to the Division Office or individual driver. However, the on-line information will be reflective of Fleet and manufacturer changes, which could be different than your original entry.

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE:, type 9 and press [ENTER].

2. At the Print screen, type x in front of the vehicle number you want to print (STATUS - REQUISITIONED) and press [ENTER].

◆ *Note:* Functions 10 through 13 on the Vehicle Replacement screen are not available at this time.

51846 7040

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Assigning Driver to New Vehicle

To take delivery of a vehicle, the MC must assign a driver to the new unit.

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 14 and press [ENTER].

```
CRM073UN           V E H I C L E   R E P L A C E M E N T          06/24/92
                               ASSIGN DRIVER
                           REGDIV 2236 COLUMBIA
                 VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
   *********** OLD ***********      ************** NEW *************
SEL  VEHICLE                        VEHICLE DELIVERY
     NUMBER  STATUS                 NUMBER    DATE  STATUS
      14361 TO BE SOLD              20861    92 04  DELIVERED
 x    14570 REQUISITIONED           20862
      16438 CANC  SALES
      20860 REQUISITIONED  NO TRADE  20860

        PF4 MENU              PF7 BACK        PF8 FORWARD
```

51846 7041

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. Type x in front of the vehicle number you wish to select and press [ENTER].

```
CRH073UN            V E H I C L E   R E P L A C E M E N T            06/24/92
                                  ASSIGN DRIVER
                               REGDIV 2236 COLUMBIA
                      VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
       *********** OLD ***********     ************** NEW *************
SEL  VEHICLE                                 VEHICLE DELIVERY
     NUMBER  STATUS                          NUMBER    DATE  STATUS
 x    14570 REQUISITIONED                     20862



        PF4 MENU                   PF7 BACK          PF8 FORWARD
```

3. At the second Assign Driver screen, follow screen prompts. If the driver is the same as on the requisition, type Y after WILL THE FOLLOWING DRIVER BE ASSIGNED TO NEW VEHICLE prompt. If the new vehicle is a cargo or cube van, it will automatically be assigned to your Division.

   Type the new vehicle serial number and vehicle license plate number and press [ENTER]. If the vehicle serial or license plate numbers are not known, type **UNKNOWN** in those fields. Serial numbers will be verified by Fleet Operations and corrected. Vehicle license plate numbers must be entered by Field Sales at a later date under Change Vehicle Assignment.

4. At the second Assign Driver screen, if the driver is *not* the same as on the requisition, type N after WILL THE FOLLOWING DRIVER BE ASSIGNED TO NEW VEHICLE? prompt.

   A window will appear with names of employees in your Division authorized to drive a vehicle. Type X in front of the designated driver and press [ENTER].

   Type new vehicle serial number and license plate number and press [ENTER].

   When the new vehicle is assigned, the status of the trade-in vehicle changes to To Be Sold (250) and the status of the new vehicle changes to Delivered

51846 7042

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(200 or 210).

Special Accessories

To inquire about special accessories for vehicles in a specific state:

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 15 and press [ENTER].

```
CRM089UN              C A R   M A S T E R   S Y S T E M              07/13/92
                           STATE ACCESSORY TABLE

STATE COMMERCIAL VEHICLE VEHICLE              SPECIAL
        PLATES    TYPE    DESC              ACCESSORIES
----- ---------- ------- ------- -----------------------------

ND    N           1      CAR     REAR WINDOW DEFROSTER
                  1      CAR     ENGINE BLOCK HEATER
                  2      VAN     ENGINE BLOCK HEATER
                  3      CUTAWAY ENGINE BLOCK HEATER
                  2      VAN     DASH AIR/REAR HEAT



                  NEXT STATE REQUESTED --> ND
                  PF4 - MENU ENTER - PROCESS
```

2. Under STATE, type the two-character abbreviation for the applicable state and press [ENTER]. The screen will show special accessories automatically ordered for each vehicle within that state.

Adding a Note

Notes are a way of communicating to your Fleet Coordinator any questions or comments you may have regarding a particular vehicle during the requisitioning period. Once a vehicle has been requisitioned, no notes may be added to that vehicle.

All canceled requisitions require a note.

51846 7043

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VEHICLE ADMINISTRATION

To process a note about a specific vehicle being requisitioned:

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 17 and press [ENTER].

```
CRM073UN           V E H I C L E   R E P L A C E M E N T              06/25/92
                                  NOTES
                          REGDIV 2236 COLUMBIA
                 VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
      ************ OLD ************    *************** NEW **************
SEL  VEHICLE                                VEHICLE DELIVERY
     NUMBER  STATUS                         NUMBER    DATE  STATUS
 x    13906 SPECIFIED
      14361 TO BE SOLD                       20861   92 04  DELIVERED
      14570 REQUISITIONED                    20862
      16438 CANC  SALES
      20860 REQUISITIONED  NO TRADE          20860


          PF4 MENU                 PF7 BACK        PF8 FORWARD
```

2. At the Notes screen, type X in front of the vehicle number you have a question/comment about and press [ENTER]. Type your question/comment and follow screen prompts. Fleet Operations will respond to the question/comment via DT or telephone.

Note Inquiry

This function allows you to view your notes regarding questions or comments about a particular vehicle written during the requisitioning period.

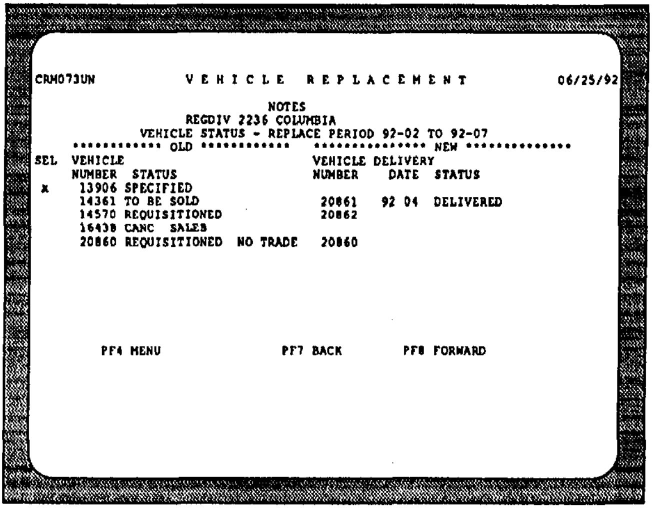
51846 7044

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

To view your notes about a specific vehicle being requisitioned:

1. At the Vehicle Replacement screen, after SELECT FUNCTION FROM ABOVE: prompt, type 16 and press [ENTER].



```
CRM073UN           V E H I C L E   R E P L A C E M E N T           06/25/92
                                 NOTES
                         REGDIV 2236 COLUMBIA
                VEHICLE STATUS - REPLACE PERIOD 92-02 TO 92-07
     ************ OLD ***********     ************** NEW *************
SEL  VEHICLE                          VEHICLE DELIVERY
     NUMBER  STATUS                   NUMBER    DATE  STATUS
 x   13906 SPECIFIED
     14361 TO BE SOLD                  20861   92 04  DELIVERED
     14570 REQUISITIONED               20862
     16438 CANC  SALES
     20860 REQUISITIONED  NO TRADE     20860



         PF4 MENU              PF7 BACK          PF8 FORWARD
```

2. At the Notes screen, type X in front of the vehicle number corresponding to the note you wish to view and press [ENTER].

◆ *Note:* At the Vehicle Replacement screen, anytime you you wish to return to the Field Office Main Menu, type 99 and press [ENTER].

Automobile Accident Procedures

Reporting an Accident

As the Operations Unit vehicle "expert," the MC should understand the guidelines regarding accidents. Please read the following closely.

Accurate and complete reporting of accidents involving a Company vehicle or rental vehicle is the responsibility of the driver, not RJRT Management.

In an accident that involves another party, the driver should:

- Immediately call law enforcement authorities to the accident scene.
- Avoid making statements that might be be understood as an admission of fault.
- Avoid making promises/comments that would obligate RJRT's

51846 7045

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

insurance company.

- Never personally pay the other party for injuries or property damage.

All negotiations and settlements should be handled by the applicable insurance carriers under the direction of RJRT Fleet Operations and/or RJRN Asset and Risk Management Departments.

The driver should verbally advise the Operations Unit Management that an accident has occurred and the driver should call the accident information to TelePlus (1-800-7KEMPER or 1-800-753-6737) within 48 hours. (TelePlus hours are 7 a.m. to 7 p.m., CST, Monday - Friday. An answering service handles after-hours emergency calls.) Management should contact Fleet and the Region Operations Manager immediately by telephone regarding any accidents involving serious injury, death, or alcohol/drugs.

All accidents, regardless of cost, that result in the the following must be verbally reported:

- Physical damage to a rented, leased, or owned vehicle (Exception: Broken glass damage only should be repaired through PPH.)
- Compensation for employee personal injury
- Second-party liability claims for injury and/or vehicle/property damage

The driver should be prepared to provide TelePlus with the following basic information:

Insured information

- **COMPANY NAME:** RJR Nabisco, Inc.
- **SUBSIDIARY NAME:** R. J. Reynolds Tobacco Company/Sales
- **ADDRESS:** Division Office address
- **TELEPHONE NUMBERS:** Business and residence
- **CONTACT NAME:** Driver

Loss information

- **DATE AND TIME OF ACCIDENT**
- **INSURANCE LOCATION CODE:**

Area 1/North Atlantic - 37501	Area 5/Pacific Mountain - 37505
Area 2/South Atlantic - 37502	Area 6/Mid-Western - 37506
Area 4/Mid-Continent - 37504	

- **ACCIDENT LOCATION:** Address, city, county, state
- **DRIVER:** Name, home address, phone numbers
- **COMPANY VEHICLE:** Model/make/year, vehicle identification number (VIN), license plate number, description of damage
- **OTHER INVOLVED PARTIES:** Names, addresses, phone numbers, property damaged with description, insurance information
- **INJURIES:** Names, addresses, phone numbers, description of injuries
- **WITNESSES:** Names, addresses, phone numbers

51846 7046

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

The driver *should request* TelePlus to capture the following in the system note fields:

- Note 1: Company vehicle or rental vehicle number
- Note 2: Driver name and employee account number

A copy of the accident report will automatically be mailed to Management at the Operations Unit address and to Fleet Operations. For the driver to receive a copy, it must be requested at the time the accident is reported to TelePlus.

Repair Instructions

TelePlus will assign the claim to an adjuster in the nearest insurance office and the driver/manager will be contacted within 48 hours. If contact has not been made within this timeframe, notify Fleet Operations.

Per request, the insurance claim adjuster will direct the driver to a reliable facility for repair estimates.

Do not assume that all repairable vehicles will be repaired. Authorization to repair a vehicle is the accountability of Fleet Operations. Many factors are considered to ensure that a cost-effective repair decision is made.

The Operations Unit will be advised by the insurance adjuster or Fleet that repairs have been approved. A draft for payment to the repair facility will be mailed to the Region Operations Manager's attention.

The driver should not imply verbal consent or sign any work orders or repair forms which authorize the facility to begin repair or order parts unless a check has been received or your manager has been notified by Kemper or Fleet Operations that repairs have been approved. Unauthorized commitments are legally binding for RJRT and can be costly.

The driver and/or Management will be responsible for followup with the repair facility for scheduling approved repairs and will ensure completed repairs are satisfactory.

Employees driving under the influence of alcohol/drugs, who damage Company vehicles, may be held accountable for 100 percent of the repair cost and/or may jeopardize their employment.

Insurance Cards

Annually, new insurance identification cards are provided for all states. If a generic statement is indicated on the cards in lieu of year/make/VIN description, prior approval has been obtained from the state allowing use of such a statement. Do *not* type vehicle information on these cards. It is recommended that accident reporting procedures, registration card, insurance card, and PHH Service Card be kept in the vehicle glove compartment.

51846 7047

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Summons, Subpoena

If a summons or subpoena resulting from an automobile accident is received, immediately forward it to the insurance company and Fleet Operations for proper handling.

Employee Agreement

Employee's Agreement Form 506 is only required for new employees who are authorized to be assigned a Company vehicle and must be faxed to Fleet Operations (919/741-6238). This agreement form is part of the new-employee packet. It is required by Fleet Operations before the MC can assign a vehicle to the employee.

Registration and Title

All vehicles acquired for Field Sales are currently leased through PHH FleetAmerica. They must be titled as follows:

D. L. Peterson Trust
307 International Circle
Hunt Valley, MD 21030-1337

All titles (leased or Company-owned) are maintained in the PHH Title and Tax Department.

When vehicles are relocated and the driver or Division Office state differs from the previous state, PHH automatically sends retitling paperwork. For drivers in Arizona, California, Colorado, Connecticut, District of Columbia, Florida, Georgia, Illinois, Indiana, Kentucky, Louisiana, Maryland, Massachusetts, Nevada, New Jersey, New York, North Carolina, Ohio, Oklahoma, Pennsylvania, South Carolina, Tennessee, Texas, Virginia, and Washington, PHH processes any paperwork and forwards plates to the driver. If license plates will expire within 3 months, request Fleet to expedite the retitling package.

Vehicles *must* be licensed and titled where they are garaged at night.

Direct any problems to PHH Title and Tax (410/771-2531).

Renewing License for Leased Vehicles

License renewal information on leased vehicles will be mailed to the driver or Division Office by PHH or the state, depending on state regulations. If the renewal notice is not received, take the old registration card, PHH Power of Attorney (available from Fleet Operations), and insurance card (if applicable within your state) to the Department of Motor Vehicles and advise them no notice was received or carry the old plate number along with PHH Power of Attorney and insurance card (if applicable in your state). *It is the responsibility of each driver to renew the license plate/sticker.* Using the excuse that no renewal notice was received from PHH or the state is not acceptable to the state as the driver is responsible for ensuring proper licensing. Operating the vehicle on expired plates/sticker could result in a violation fee. Division Office/drivers should *not* mail renewals to the state as the new plate/sticker will be delayed. The states of Connecticut and New Jersey are exceptions and require that vehicle registration renewals be handled by mail.

51846 7048

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Transferring Vehicles

When vehicles are transferred between Divisions, notify Fleet Operations that the vehicle is being transferred/reassigned. Forward the vehicle file to the new Division and place the PHH Service Card in the vehicle glove compartment.

When vehicles are being picked up by an auto auction firm, destroy the PHH Service Card and retain the vehicle file in your Division Office per retention guidelines.

Disposal of Company Vehicles

Unpurchased Vehicles

If the driver or a third party elects not to purchase the old vehicle, it should be left at the dealership where the new vehicle is delivered. PHH will make arrangements to dispose of the vehicle.

Employee /Third-party Purchase

To expedite the sale of Company vehicles to an employee or third party, RJRT has contracted for PHH to handle all sales via their ValueBuy program. The following procedure will be implemented at the time the used vehicle is to be replaced:

1. A price quote to purchase the used vehicle will be automatically sent to the driver by PHH in all states except Ohio. Ohio quotes will come from Fleet Operations and the purchase will be handled through RJRT on all leased or Company-owned vehicles. The driver will have first option to purchase the vehicle. If the driver declines the purchase, the vehicle may be sold to any interested party, including other employees or a third party.

2. Employees or third parties will have 15 days to respond by mailing the reply to PHH in the envelope provided or FAX their response to Fleet Operations (Ohio).

3. Guidelines have been established with PHH that give the employees or third parties a savings should they purchase the used vehicle.

4. If an employee or third party elects to purchase a vehicle, PHH or Fleet (Ohio) will forward additional instructions outlining the steps necessary to complete the transaction.

5. The purchase price will be due the day the employee's new vehicle is delivered. The price of the used vehicle is *not* negotiable. When the new vehicle is delivered, the purchaser will take possession of the old vehicle.

IMPORTANT: Once delivery is taken on the new replacement unit, RJRT ceases to carry insurance on the trade-in/purchased unit. License plates on the old unit should be transferred if applicable or turned in to the Department of Motor Vehicles.

51846 7049

Copyright © R.J. Reynolds Tobacco Company 1993

Surplus

Fleet Operations requires notification of surplus vehicles via letter or DT from Field Sales Management. Therefore, as the MC is informed about surplus vehicles, contact with Fleet is essential. On notification, an evaluation of the condition of the surplus vehicle will be made. Vehicles of high mileage and in poor condition will be picked up immediately for disposal by PHH. Vehicles with low mileage and in good condition will be retained in the surplus inventory for a minimum of 90 days in an attempt to obtain maximum usage potential.

Glass Breakage

When glass breakage (e.g., windshields or other windows) occurs as a result of break-in, vandalism, or minor accident with no body damage, an accident report should *not* be filed through Kemper TelePlus. Have glass repaired through PHH Maintenance.

For glass breakage involving body damage to the vehicle, follow Automobile Accident Procedures (given in this section).

Alarm Repair

Repairs to alarms on vehicles should be made for high-risk assignments only and with the approval of the Region Operations Manager. Coordination of alarm repairs should be directed to the local Maxiguard servicing agent or Maxiguard (800-323-6601) for vehicles prior to model year 1993. Repair/replacement for 1993 and later model years should be directed to Tom Nagy, Sales (800-232-4479)

Job Codes

Job codes authorized/not authorized to have a vehicle assigned are dictated by Home Office Sales. Direct any questions about this to your Sales Region Office.

Fleet Operations Contacts

Sr. Fleet Representative:

Jan Faries 919/741-3044

Coordinators:

Robin Blakley	919/741-6047
Debbie Hunter	919/741-7602
Lu Ann Boles	919/741-6034

Insurance:

Debbie Hunter	919/741-7602
FAX number	919/741-6238
DT address	FLET
Fleet address	P.O. Box 1325 Winston-Salem, NC 27102

Biweekly Expense Report for New Vehicle

The MC must ensure the driver of the new vehicle is aware of the following guidelines. After the new vehicle is delivered, the Sales Representative must submit *two* expense reports - one for the old vehicle and its expenses only and one for the new vehicle.

51846 7050

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

When the new vehicle is delivered, it should immediately be assigned to the driver in the Car Master System. The driver's old unit will automatically capture the driver's employee number as the previous driver and change the old vehicle status to a 240 or 250 code. The MC should enter the vehicle expense on the old unit in SES using analysis code 001. A 30-day window is allowed for entering vehicle expenses on the old unit.

51846 7051

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK IV: PERSONNEL & ADMINISTRATION COORDINATOR

51846 7052

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK IV

PERSONNEL & ADMINISTRATION COORDINATOR

PROCEDURES

© R.J. Reynolds Tobacco Company 1993

51846 7053

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK IV:
PERSONNEL & ADMINISTRATION COORDINATOR

This Personnel & Administration Coordinator (PC) handles all tasks associated with the processing of employee administration, HRIS, PAF, maintenance, The PC is also charged with the responsibility for answering phones, making meeting arrangements, and handling travel arrangements.

The PC is also charged with performing the administrative functions associated with Voice-Mail, the Temporary Payment System, and all correspondence.

CHAPTER 1: APPLICATION PROCESSING............................ 1-1

Summary.. 1-1

Phone Calls Requesting Application.......................... 1-1

Receiving Resumes... 1-1

Employee References... 1-1

Application Flow Tally...................................... 1-1

Interviewing.. 1-2

CHAPTER 2: PERSONNEL SYSTEMS................................ 2-1

Summary.. 2-1

PDS System Access Procedures................................ 2-1

Logon Procedures.. 2-1

Logoff Procedures... 2-4

Navigating Around PDS....................................... 2-4

Issuing and Approving Reprimands............................ 2-7

Accessing Reprimand Screen.................................. 2-7

Locating Employee's Social Security or Account Number........... 2-9

Creating a New Reprimand.................................... 2-11

Inquiring About an Existing Reprimand....................... 2-20

Approving a Reprimand....................................... 2-29

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

New Hire Administration 2-30

Processing New Hires 2-30

Adding a New Hire 2-33

Processing Rehired Employees 2-50

PAF and HRIS Maintenance 2-62

Making Status Changes 2-63

Making Other Changes 2-82

Entering Addresses - Do's and Don'ts 2-85

Emergency Contacts - Do's and Don'ts 2-85

Balancing Transactions 2-86

Requesting PAFs 2-86

Entering Sales Bonus Information 2-89

Prorating an Employee Account 2-93

Employee Job Change 2-94

CHAPTER 3: FIELD SALES OPERATING FUNDS 3-1

Summary 3-1

New Funds/Increase to Current Funds 3-1

Transfer of Funds 3-5

Fund Reduction 3-9

Confirming Fund Balances 3-13

Fund Shortages at Termination 3-13

Jobber Agreement Form 3-13

Handling Break-ins/Uncollected Bill-throughs 3-17

Cigarette Excise Tax Increases 3-21

CHAPTER 4: COMMUNICATIONS 4-1

Summary 4-1

General Telephone Etiquette 4-1

51846 7055

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Fielding Complaints.. 4-1
Calls to Home Office in Winston-Salem........................... 4-1
Handling Claims.. 4-17
Voice Mail... 4-17
Using InfoMail.. 4-17
Quick Reference Summary..................................... 4-18
CHAPTER 5: TRAVEL ARRANGEMENTS................................ 5-1
Preliminary Activities.. 5-1
Utilizing American Express Business Travel.................... 5-1
Making Travel Arrangements Directly With Hotels............... 5-2
CHAPTER 6: MEETING ARRANGEMENTS............................... 6-1
Preliminary Activities.. 6-1
Making Meeting Arrangements................................... 6-1
Making Meeting Books.. 6-1
CHAPTER 7: CORRESPONDENCE..................................... 7-1
Preliminary Procedures.. 7-1
Sorting Incoming Mail... 7-4
Sending Mail.. 7-5
Document Transporters (DTs)................................... 7-5
Receiving Incoming DTs...................................... 7-5
Sending DTs... 7-6
Electronic Mail... 7-7
General Information... 7-7
Accessing Electronic Mail..................................... 7-8
Exiting Electronic Mail....................................... 7-8
Receiving Mail.. 7-9
Printing Mail... 7-9

51846 7056

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Sending a Document 7-10
Addressing Mail 7-11
Status 7-12
File Cabinet 7-13
Distribution Lists 7-14
Sending a Message 7-15
Sending a Note 7-15
Electronic Mail Directory 7-16
Electronic Mail User Defaults 7-19
Faxes 7-19
Receiving Faxes 7-19
Sending Faxes 7-19
CHAPTER 8: TEMPORARY PAYMENT SYSTEM 8-1
VOUCHERS (TEMPORARY PAYMENT SYSTEM) 8-1
Summary 8-1
Office Expenses 8-1
Creation of an Account for a New Vendor 8-1
Vendor Account Update 8-6
Account Deletions 8-8
Office Expense Payment System 8-8
Invoice Payment Procedures 8-9

51846 7057

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 1
Application Processing

51846 7058

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

APPLICATION PROCESSING

Summary

The PC is responsible for controlling and handling all application processing in the Region.

Phone Calls Requesting Application

1. A phone call is received and an RJR application is requested.
2. PC must inform caller that RJR does not mail out application forms.
   - Advise the individual that they may apply for employment by submitting a resumé
   - Give them the name and address of the Region Operations Manager

Receiving Resumés

1. PC receives resumé into the Operations Unit.
2. Resumé should be forwarded to the Region Operations Manager for review:
   - If the resumé is unsolicited and addressed to The Company or To Whom It May Concern, the Region Operations Manager is not required to respond and can discard the resumé if there is not interest in the individual.
   - If the resumé is addressed to a specific individual in response to a direction given over the phone or an employee referral, a sample letter from the HRIS book should be mailed to the individual providing one of the following directions:
     - Rejecting the individual due to qualifications (sample letter 10) or
     - Indicating an interest in the candidate and enclosing an RJR application form to be completed and returned. Sample letter #1. This application should remain on file for a period of one year.

Employee References

When an employee has identified a potential candidate for employment, they should advise the individual to complete a resumé and forward to the Region Office. The instructions should also include to address the resumé to the Region Operations Manager.

Application Flow Tally

All potential candidates for employment must be tracked via an Application Flow Tally. An applicant is defined as a potential candidate that has completed an RJR application for 1456A.

51846 7059

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

1. As RJRT applications are turned in, the Applicant Flow Tally must be utilized to track persons who have completed an RJRT application (sample on following page).

Interviewing

All interviewing for full-time positions will be administered by the Region Operations Manager only. Interviews for part-time personnel should be administered at Division/District level.

51846 7060

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

06/10/93 12:35 RJR WS REG./CHAIN 2100 002

RJRS Form 4357 — Rev. 4/88

DIV./DIST. ______________________

YEAR ____________ QUARTER ____________

APPLICANT FLOW

QUARTERLY SUMMARY

WHITE — Retain in Division Office.
YELLOW — Mail to Sales Area Office.

JOB CATEGORY	WHITE		MINORITY							
			MALE				FEMALE			
	M	F	BLK	A/PI	AI/AN	H	BLK	A/PI	AI/AN	H
Officials/Managers										
Professionals										
Technicians										
Sales Workers										
Office/Clerical										
Craftworker										
Operatives										
Laborers										
Service Workers										
TOTAL										

Mail-in applications and resumes with race and sex unknown is ________ for this quarter.

Applications received denoting handicapped is ________ for this quarter.

Applications received denoting disabled veteran is ________ for this quarter.

Applications received denoting veteran of the Vietnam era is ________ for this quarter.

NOTE: Field Sales should make entries in the Sales Worker and Office/Clerical sections only.

TOTAL APPLICATIONS FOR THIS QUARTER — ________.

KEY:
BLK – Black
A/PI – Asian or Pacific Islander
AI/AN – American Indian or Alaskan Native
H – Hispanic

51846 7061

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7062

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 2
Personnel Systems

51846 7063

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PERSONNEL SYSTEMS

Summary

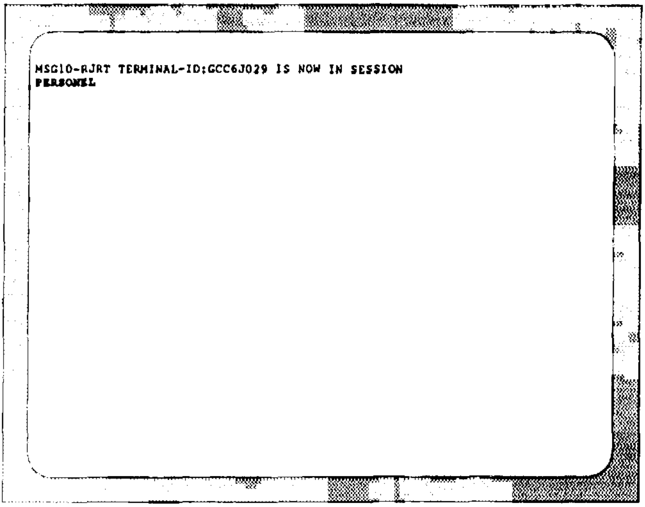
The Personnel & Administration Coordinator will utilize RJRT's Personnel System (PDS) to perform various job accountabilities. The PDS, is used to:

- Issue and approve reprimands.
- Make changes to the employee record.
- Enter salary bonus information.

PDS System Access Procedures

Logon Procedures

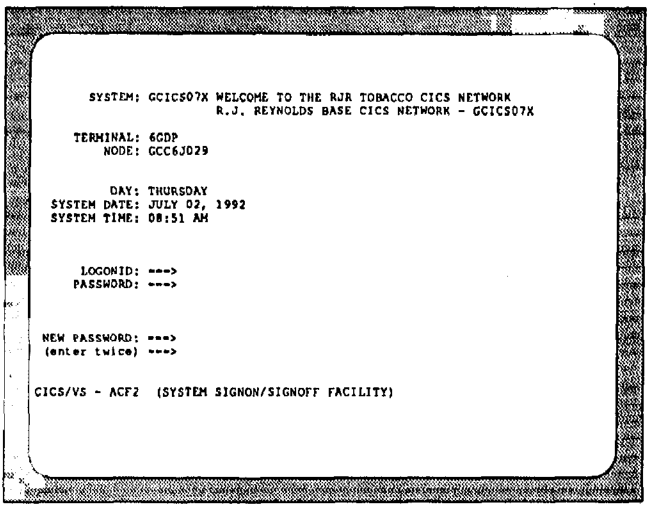
1. With the MSG-10 screen displayed, enter PERSONEL (one n) and press [ENTER].



51846 7064

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The logon screen will be displayed. Enter your logon ID and password and press [ENTER]. You will not be able to see what was entered in the PASSWORD field.



51846 7065

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. The SIGNON IS COMPLETE screen will be displayed.

```
ACFAE139 ACF2/CICS: 3BSV    SIGNON COMPLETED:  LOGONID-WGBXG NAME-BETH MATHI
```

4. Enter PDS1. The Personnel Data System Main Menu will be displayed.

```
P D S                        PDS INQUIRY/UPDATE                        PDS**
*****************************************************************************
    Func        Description                       Func        Description
    -----  ----------------------------           -----  ----------------------
  1 PDS01 EMPLOYEE MAINTENANCE
  2 PDS02 OPERATOR BALANCE AND RELEASE
  3 PDS03 PDS FUNCTIONAL SECURITY




PDS900M  Selection: _________________________________________ 10-15-1992 11:03
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
Sel   Exit        Zoom                                 Help
```

51846 7066

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Logoff Procedures

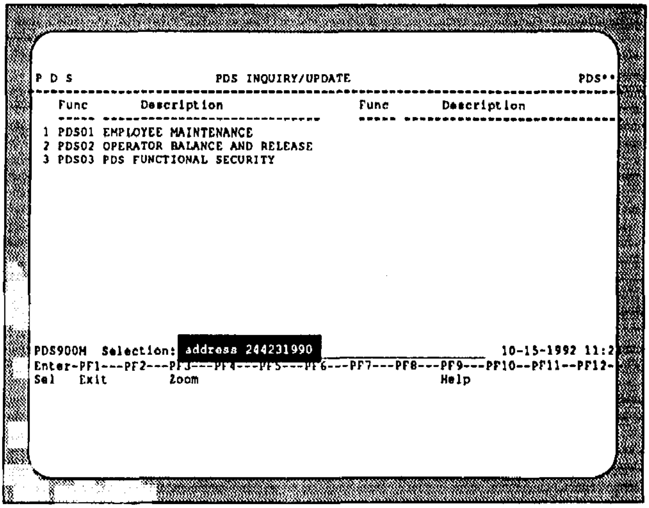
1. From any screen, press [PF1] to exit until you receive the CESF LOGOF screen. If you are in the reprimand screen, enter 999 in the FUNCTION field and press [ENTER] until the CESF LOGOF screen is displayed.

2. Press [ENTER]. You will be returned to the MSG-10 screen.

Navigating Around PDS

Once you have logged on to PDS you will find that navigating around the system is remarkably easy. In fact, all you need to know are a few keywords.

1. For example, if you want to make an address change to an employee account, enter ADDRESS and the employee social security number in the SELECTION line.



51846 7067

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. Press [ENTER]. The system will display the record for this employee.

```
P D S                         EMPLOYEE MAINTENANCE                        PDS01
-------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY                         Corp: 4   Stat: 25
-------------------------------------------------------------------------------
First Name: HOLLY____ Initials: W_ Last Name: WOOD________________

             SSNO: 123456789_ Account: 123456_____       08-18-1986

     Home Address: 88 WEST SIXTH STREET___         10-09-1992
                   ________________________

             City: LINCOLN________     State: NC Zip: 28642___

        Residence: USA__________       Province: ____________

       Home Phone: (704) 654-4321

       Work Phone: ____________

PDS00153 Command: ____________________________________________ 10-15-1992 11:29
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

3. While entering the employee's social security number is the fastest way to access the record you may also enter as much of the employee name as is known in the command line. If more than one employee with this name exists, a window will be displayed for selection.

51846 7068

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
P D S                         PDS INQUIRY/UPDATE                                PDS**
-------------------------------------------------------------------------------------
  Func
  -----   PDS01 Name search: Selection, <ENTER> or <99> to exit.          --------
1 PDS01                   Name                       SSNO      Crp P St
2 PDS02        ---------------------------------- ---------- --- - --
3 PDS03      1 SMITH,           P                  247430930  430 6 15
             2 SMITH,           R                  150642005  430 6 15
             3 SMITH, ALBERT E                     071241501  430 6 10
             4 SMITH, ALBERT R                     239424037  004 6 17
             5 SMITH, ALBERT B                     428601239  270 6 15
             6 SMITH, ALDEN C                      168300417  444 2 10
             7 SMITH, ALFONSO                      418603161  270 6 15
             8 SMITH, ALFRED J                     121248650  270 4 17
             9 SMITH, ALFRED C                     221340930  430 6 15
            10 SMITH, ALFRED A                     456304124  430 6 17
            11 SMITH, ALFREDA M                    245311505  270 2 10
            12 SMITH, ALICIA M                     103600046  430 2 10
          Selection: __

PDS900M  Selection: address smith ______________________  10-15-1992 11:3
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
Sel    Exit         Zoom                                   Help
```

4. Press [ENTER] until you see the employee you are looking for and enter the number that corresponds to your selection the SELECTION field.

5. Press [ENTER]. The employee record will be displayed.

6. There are many keywords which the system recognizes. A list of keywords is available by pressing [HELP] and selecting the option Valid Command Line Information Types.

   Some of the keywords include:

NAME	ADDRESS	PHONE
ACCOUNT	SSNO	BIRTHDATE
RACE	SEX	VETERAN
HANDICAP	EMERGENCY	SPOUSE
COMPANY	LOCATION	SALARY
ANNUAL	RATE	JOB
SHIFT	STATUS	MARITAL
SIAP	EXPATRIATE	LUMP SUM
PERFORMANCE	EMPLOYMENT	CERTIFICATION
OTHER	EDUCATION	HIRE
REHIRE	TRANSFER	REPRIMAND

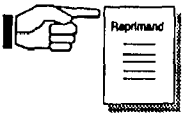
51846 7069

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. Keywords make navigating the system very simple. In fact, it is nice not to have to remember a bunch of function numbers, isn't it? If you enter a keyword not known by the system, an error message will be displayed. Just press [ENTER] and try again.

8. You will be performing some basic operations using PDS so remember these keywords:



- **REPRIMAND, REVIEW or 510** - These access the screens to be used to enter and approve employee reprimands.

- **ADDRESS or EMERGENCY** - These access the screens to be used to change employee addresses and emergency contact information.

- **SIAP** - This accesses the screen to be used to enter employee bonus information.

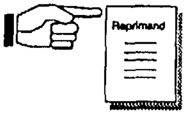
Issuing and Approving Reprimands

This section provides procedures for performing each of the following tasks:

- Creating a New Reprimand
- Inquiring on and Making Changes to an Existing Reprimand
- Approving a Reprimand

Accessing Reprimand Screen

1. To access the Reprimand screen, you will need to enter one of the following keywords in the SELECTION field and press [ENTER].



- REPRIMAND, REVIEW OR 510 - These keywords access the screens to be used to enter and approve employee reprimands.

51846 7070

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
12/02/92   10:42          Special Reviews - Sales                    GLJ510R
*******************************************************************************
Account:                                  Job:
Location: 000                             Dept:                  Pay:
Service Date:
------------------------------ List of Reviews --------------------------------
Sel  Rev-Date  App Att  Manager                       Typ Reason

*******************************************************************************
Social Security Number: __________       Selection: __       Account: ______
Function 510
Func 512 for new review      PF6 Detail/Modify (Make selection)      PF1 Help
```

Refer to the following sections, depending on the task you wish to complete.

51846 7071

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Locating Employee's Social Security or Account Number

- *Note:* This procedure may also be used to locate the account number of the manager.

Finding Employee Number

1. If you do not know the employee's social security number or account number after logging on to the reprimand screen, [TAB] to the FUNCTION field and enter 360.

2. The following screen will be displayed.

```
10/22/92 11:43                                                        GLJ360R
------------------------------------------------------------------------------
   Employee Name              Soc Sec No    Acct   Corp Pay Shf Loc Grp  Dept St





----------------------------------- (More) -----------------------------------
Function: 360   Selection: __   NEXT ACCT: __________       NEXT SSN: ________
NEXT LAST NAME: ________________________  NEXT FIRST NAME: ___________
PF6 - Non RJR only (Add/Change/Delete Function)
PF7 - Employee Detail (Make Selection)        Include Inactive Employees?: Y
```

3. Type as much of the employee's name as is known in the LAST NAME and FIRST NAME fields and press [ENTER]. The system will display a list of employees matching that criteria. Enter the selection number corresponding to the desired employee in the SELECTION field and press [PF7].

51846 7072

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The system will display the Personnel Administration System Main Selection Menu and the account number of the employee selected will be displayed in the ACCOUNT field.

```
11:52 10/22/92                    SELECTION MENU                         GLJ002R
                           SOCIAL SECURITY NUMBER NOT ON FILE
FUNC DESCRIPTION              FUNC DESCRIPTION            FUNC DESCRIPTION
 002 Selection Menu            360 Emp Inquiry Menu        510 PERFORMANCE INQ
 512 Special Revw Upd          999 Log Off

--------------------------------------------------------------------------------
FUNCTION:                         CURRENT USERGROUP: SALESD
ACCOUNT:  72307______
```

5. Enter 510 in the FUNCTION field and press [ENTER] to access the reprimand screen again. Refer to the procedures that follow for information on creating, inquiring, changing and approving reprimands.

51846 7073

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Creating a New Reprimand

1. With the reprimand screen displayed, enter either the employee's social security number (enter dashes) or account number in the SOCIAL SECURITY NUMBER or ACCOUNT fields and press [ENTER].

```
10/15/92   13:04          Special Reviews - Sales                GLJ510R
--------------------------------------------------------------------------
Account:                                 Job:
Location: 000                            Dept:                 Pay:
Service Date:
------------------------------ List of Reviews ---------------------------
Sel  Rev-Date  App Att  Manager                    Typ Reason




--------------------------------------------------------------------------
Social Security Number: _________       Selection: __      Account: _____
Function 510
Func 512 for new review      PF6 Detail/Modify (Make selection)     PF1 Help
```

51846 7074

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. If this account has special reviews associated with it, they will be displayed on the screen.

```
10/15/92   14:39          Special Reviews - Sales                    GLJ510R
------------------------------------------------------------------------------
Account: 98765 LEAR, CHANDA          Job:    14350 DIV SALES MGR
Location: 000 FS  Field Sales        Dept: 4336                Pay: 2
Service Date: 05-21-1973
---------------------------- List of Reviews ---------------------------------
el  Rev-Date  App Att  Manager                      Typ Reason
1  08-24-1992  +   N    39967                       Rep DUCTWR




------------------------------------------------------------------------------
Social Security Number[redacted]: __                        Account: 98765
Function 510
Func 512 for new review      PF6 Detail/Modify (Make selection)      PF1 Help
```

51846 7075

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. To create a new reprimand, enter 512 in the FUNCTION field and press [ENTER]. The Special Performance Review Update screen will be displayed.

```
10/15/92  14:39    Special Performance Review Update - Sales      CLJ515U
---------------------------------------------------------------------------
Account: 98765 LEAR, CHANDA          Job:    14350 DIV SALES MGR
Location: 000                        Dept: 4336            Pay: 2
Service Date: 05-21-1973
---------------------------------------------------------------------------

Review Type: R      Reprimand
Reason      : ______
Manager     :
Review Date: 10-15-1992

Approval Status: S

Enter Comments(Y/N): Y
___________________________________________________________________________
Entered-By:
Changed-By:
Approval-1:
Approval-2:
---------------------------------------------------------------------------
                    Attachment: N      Display Form:        Print Form:
PF1 Help     PF2 Add     PF3 N/A       PF4 Delete       PF5 Return (no action)
```

51846 7076

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. With the cursor on the REASON field, press [PF1] for a list of reason codes. A window will display allowable codes.

```
10/15/92   14:39    Special Performance Review Update - Sales      GLJ515U
-----------------                                                  ----------
Account: 98765  L   REPRIMAND CODES                                2
Location: 000
Service Date: 05-     Code       Description
-----------------     DRUGFW   Alcohol/Drug Final Warning          ----------
Review Type: R        DRUGTM   Alcohol/Drug Termination
Reason     : ___      DUCTFW   Misconduct Final Warning
Manager    : ___      DUCTTM   Misconduct Termination
Review Date: 10-1     DUCTWR   Misconduct Written Reprimand
                      FALSFW   Falsification Final Warning
Approval Status:      FALSTM   Falsification Termination

Enter Comments(Y/   You may select a reason code by placing
Entered-By:         'X' next to your choice.                      __________
Changed-By:
Approval-1:         Press Enter for continuous scrolling of
Approval-2:         all reprimand reason codes.
-----------------                                                  ----------
                    PF5 - Return                                   Int Form:
PF1 Help    PF2                                                    (no action)
```

5. Press [ENTER] to page through the list until you locate the desired reason code. Place an X beside your choice and press [ENTER]. The system will display your choice in the REASON field.

6. Enter the account number of the employee's manager in the MANAGER field.

   ◆ *Note:* If you do not know the account number of the manager, you will need to exit from this screen by pressing [PF5]. With the first reprimand screen displayed, enter 360 in the FUNCTION field. Follow the procedures as described for Locating an Employee Social Security Number or Account Number for information on finding the manager's account number and returning to this screen.

51846 7077

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. To enter comments, make sure a Y is displayed in the ENTER COMMENTS field and press [PF2].

- *Note:* The introduction and the concluding remarks of the reprimand or termination letter have already been created for you. They will appear at the top and the bottom of the printed letter automatically but will not appear on the screen. For example, the shaded areas in the following letter are provided by the system. The comments you enter using the free-form comments field will comprise the body of the letter.

A sample termination letter

Introduction is supplied by the system →

The purpose of this report is to document the termination of your employment due to your sub-standard performance relating to the following.

You will enter the body of the letter using the free-form comments field →

The comments you type in the free-form comments field will appear in the body of the letter.

Conclusion is supplied by the system →

Based on all of the above, your employment is being terminated effective immediately. As of this date I have read and discussed this report with you, and you have been given the opportunity to sign the report and attach any comments you may have. It is understood that this document will be placed in your personnel file, and that you will be given a copy for your records.

Manager ____________________ Date ________

Employee ____________________ Date ________

Original to Sales Employment Practices Manager, Winston-Salem
CC: Regional Manager

51846 7078

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

A sample reprimand letter

Introduction is supplied by the system

The purpose of this report is to document the corrective action being issued to you due to your sub-standard performance relating to the following:

You will enter the body of the letter using the free-form comments field

The comments you type in the free-form comments field will appear in the body of the letter.

Conclusion is supplied by the system

Management will assist you in improving your performance to an acceptable level through any reasonable means, however, the ultimate responsibility for attaining and sustaining an acceptable level of performance rests with you.

You are encouraged to seek management's assistance whenever a need or question arises concerning your job duties and accountabilities, and to take advantage of the Company's Employee Assistance Program if there are outside issues or concerns which might be negatively impacting your performance.

In the event you fail to show the necessary improvement in your overall job performance, you will be subject to further corrective action, up to and including the termination of your employment.

As of this date I have read and discussed this report with you, and you have been given the opportunity to sign the report and attach any comments you may have. It is understood that this document will be placed in your personnel file, and that you will be given a copy for your records.

Manager ____________________ Date ________

Employee ____________________ Date ________

Original to Sales Employment Practices Manager, Winston-Salem
CC: Regional Manager

51846 7079

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. The free-form comments screen will be displayed for entering the comments specifically related to this reprimand.

```
10/15/92      Comment Screen for  LEAR, CHANDA
                          Sales Special Review
                                Screen 1
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________
________________________________________________

Paging F  (F)orward  (B)ack  (E)nd        Update Y  (Y)es  (N)o
```

9. You may begin by typing your comments on this screen. You may enter up to nine screens (which is the equivalent of 3 typed pages) of comments to be associated with this reprimand. Note that the comments screen does not operate like a word processor. The information will appear in the letter the way you type it on the screen. You will need to observe any special spacing requirements and ensure that your spelling is correct. If you go back and insert comments, the screen will not scroll the remaining information forward — you will have to rekey it.

10. After you have completed information on the first screen and need to go on to the next screen, be sure a F is displayed in the PAGING field and a Y in the UPDATE field and press [ENTER]. A new empty page will be displayed. You may continue in this manner up through a maximum of nine screens.

11. When you have finished your entry, [TAB] to the line just below the last sentence and enter $$$$. This indicates to the system that comments have been completed and will eliminate excess spaces in the letter. [TAB] to the PAGING field and enter E to end. Place a Y in the UPDATE field to update the letter with your comments. Press [ENTER].

12. The system will display the form letter.

51846 7080

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

13. Press [ENTER] to page through the letter. You will be returned to the Special Performance Review Update screen. Note that your name, the date and time that the comments were entered will be displayed on the lower half of your screen.

14. If the reprimand is acceptable, print the form by entering a Y in the PRINT FORM field and pressing [ENTER]. The following screen will be displayed.

```
09:44  10/22/92          Special Performance Form              CLJ515M




                       Send Output To: VADER, GARTH
                             Printer: U1011


------------------------------------------------------------------------
Function: ___                                               Submit? Y
```

15. To print the letter, just press [ENTER]. (You do not have to enter anything in the FUNCTION field.) The following batch job submission screen will be displayed. Note that the default is set to print at night to reduce costs. If you absolutely must review the letter immediately, change the indicator on this screen to N. To cancel the print request, enter a C.

51846 7081

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

TEMPORARY POINT OF SALE ORDER FORM

WINSTON POINT OF SALE	COMM #	QTY.
24" CARD	398092	
RISER CARD	398103	
DUMP BIN RISER CARD	398081	
SHELF STRIP	399192	
WINSTON STARBURST	417771	

SALEM POINT OF SALE	COMM #	QTY.
24" CARD	409598	
RISER CARD	409620	
DUMP BIN RISER CARD	409609	
SHELF STRIP	409663	
PASTER	409631	

CAMEL POINT OF SALE	COMM #	QTY.
24" CARD	408707	
RISER CARD	408696	
DUMP BIN RISER CARD	408685	
SHELF STRIP	408718	
PASTER	409301	

MULTI BRAND POS	COMM #	QTY.
24" CARD	404483	
RISER CARD	404472	
DUMP BIN RISER CARD	404461	
SHELF STRIP	404505	

STERLING POS	COMM #	QTY.
24" CARD	184725	
RISER CARD	184692	
DUMP BIN RISER CARD	184703	
SHELF STRIP	184714	

MAGNA POS	COMM #	QTY.
24" CARD	184989	
RISER CARD	249042	
DUMP BIN RISER CARD	249063	
SHELF STRIP	249084	
MAGNA / STER. CHANNEL	380789	

DORAL "TAKES ON NEWPORT"	COMM #	QTY.
EXTENDED LARGE PPD	404109	
EXTENDED SMALL PPD	404098	

STERLING "TAKES ON NEWPORT"	COMM #	QTY.
EXTENDED LARGE PPD	382298	
EXTENDED SMALL PPD	382302	

STERLING "TAKES ON B&H"	COMM #	QTY.
EXTENDED LARGE PPD	382262	
EXTENDED SMALL PPD	382263	WOBB

MISC. SAVINGS POS	COMM #	QTY.
NEON STARBURST	247194	
NEON STARBURST	247194	
LARGE STIKER/MONARCH	405902	
LARGE STIKER/BEACON	395364	
SMALL STICKER/BEACON	395375	
E'DAY LOW PRICE PK. STICK. (BLUE OVAL STICKER)	433409	

NEW "DORAL TASTE" POS	COMM #	QTY.
16" PLG. MDSR. CARD	434452	
DISPLAY CHANNEL STRIP	434463	
16" PKG. MDSR. TRANS.	434474	
24"PKG. MDRS. CARD	434485	
24" PK. MDSR. TRANS./PRICE	434496	
19" CANOPY CARD	434507	
19" CANOPY TRANSPANENCY	434518	
28" CANOPY TRANSPARANCY	434529	
24" ENHANCED CAN. TRANS.	434540	
36" ENHANCED CAN. TRANS.	434551	
LARGE PPD CARD	434562	
EXT. LARGE PPD CARD	434573	
DOUBLE SIDED SM. PPD CRD.	434584	
LARGE PASTER	434595	
SHELF STRIP	434606	
LARGE SAV. CENTER CARD	434617	
PPCD SIDE CARD	434628	
WOBBLER W/PRICE AREA	434639	
DUMP BIN RISER CARD	434661	
PREM. DISPLAY RISER CARD	434672	

CAMEL 2ND HALF '93 POS	COMM #	QTY.
RU 8 COL OPM TRANS	386630	
RU 16" PK MERCH TRANS	386751	
RU 16" PK MERCH CARD	386619	
RU 24" PK MERCH TRANS	386520	
RU 24" PK MERCH CARD	386608	
RU SMALL PPD CARD	386718	
RU LARGE PPD CARD	386586	
RU G/M DISPLAY STRIP	386828	
RU DISPLAY CHANNEL STRIP	386817	
RU SHELF STRIP	386575	
RU 19" CANOPY TRANS	386740	
RU 24" ENH CANOPY TRANS	386698	
RU 36" ENH CANOPY TRANS	386686	
RU FLEX SIDE TRANS	386762	
RU SMALL SIDE CARD	386839	
RU HORIZ D/F TRANS	388863	

MONARCH "AFFORDABLE QUAL"	COMM #	QTY.
WOBBLER	438978	
DISPLAY CHANNEL STRIP	438602	
24" PKG. MDSR. CARD	438613	
DBL. SIDED SM. PPD CARD	438624	
LARGE PPD CARD	438635	
DBL. SIDED 19" CANOPY CRD.	438646	
DUMP BIN RISER CARD	438657	
PREM. DISP. RISER CARD	438668	
EX. LARGE PASTER (24"X36")	438679	
B1G1F STARBURST	438690	

TEMP. DISPLAYS	SKU/PK.	COMM #	QTY.
20-30-40 PACK	BOX	198929	
LARGE DUMP BIN	BOX	171239	
FLOOR BASE	BOX	393142	

P. P. D. COMPONENTS	SKU/PK.	COMM.#	QTY.
15 PACK TRAYS	BOX	193679	
SIGN HOLDER	BOX	188144	
LARGE FRAME SIGN	BOX	179214	
SMALL FRAME SIGN	BOX	182107	
BASE EXTENSION	BOX	177352	
TELECOPE UPRIGHT	BOX	188136	
SMALL CHANNEL HOLDER	BOX	395265	

WIRE PCD COMPONENTS	SKU/PK.	COMM.#	QTY.
120 PACK WIRE DISP.	BOX	137901	
ADJ. COUNTER STAND	BOX	165985	
SPECIAL TOP SIGN	BOX	141804	
MOUNTING BRACKET	BOX	129619	

NAME:

DIVISION: EMP #:

DATE:

IDENTIFY A SHIP TO LOCATION BELOW

SIS ACCOUNT #

DIV./DIST.OFFICE #

TERRITORY #

STORAGE SHED OR OTHER:

ATTN: PAT BERKOWITZ

51846 7082

Source: https://www.industrydocuments.ucsf.edu/docs/ynky0000

51846 7083

LIST OF SHIP TO POINTS

NAME		TITLE	ACCT#	DIV#	TERR#	SHIP TO ADDRESS FOR COUPONS	SPECIAL HANDLING	LOCATOR CODE	SHIP TO ADDRESS FOR POINT OF SALE MATERIAL	SPECIAL HANDLING	LOCATOR CODE
PHILADELPHIA REGION											
RENEHAN	JOHN P.	RSM	51183	1300	XX	N/A			N/A		
METZ	GAIL	AS	73094	1300	XX	N/A			N/A		
PHILADELPHIA OPERATIONS DIV.											
GOODMAN	MARK J.	ROM	53312	1310	XX	N/A			N/A		
BERKOWITZ	PATRICIA	AS	77924	1310	XX	N/A			N/A		
SCHMIDT	GERALDINE	AA	57638	1310	XX	N/A			N/A		
YOST	MARY	SFS	826837	1310	XX	N/A			N/A		
READING DIVISION											
GILOTTY	PAUL J.	DM	66065	1324	XX	1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605			1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
MILLER	STEVEN A.	T&D	56906	1324	XX	1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605			1324 DIV. OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
HERLIHY	JAMES D.	SAM	71460	1324	XX	1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605			1324 DIV. OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
BRANDT	Kevin F	SR	77340	1324	3	1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605	1324		1324 DIV. OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
BUEHLER	Shirley	ASR	71990	1324	1	SECURITY SELF STORAGE UNIT 430, 1666 ROHRERSTOWN RD., LANCASTER, PA., 17601	INSIDE DEL & CALL AHEAD 717-560-0380	132435	SECURITY SELF-STORAGE UNIT 430, 1666 ROHRERSTOWN RD., LANCASTER, PA., 17601	INSIDE DEL & CALL AHEAD 717-560-0380	
CAREY	STAN A.	ASR	40642	1324	11	MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388	132424	MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388	
CUSSATT	Anthony B	ASR	60504	1324	6	MILLER WHOLESALE, 17 N. PINE LANE, SUMMIT HILL, PA., 18250		132423	MILLER WHOLESALE, 17 N. PINE LANE, SUMMIT HILL, PA., 18250		
GALLAGHER	Eileen M	SR	77341	1324	5	MILLER DIST. 300 S. 4TH ST., ST. CLAIRE, PA., 17970		132422	MILLER DIST. 300 S. 4TH ST., ST. CLAIRE, PA., 17970		
GIVENS	Richard	ASR	65449	1324	2	SECURITY SELF-STORAGE UNIT 430, 1666 ROHRERSTOWN RD., LANCASTER, PA., 17601	INSIDE DEL & CALL AHEAD 717-560-0380	132425	SECURITY SELF-STORAGE UNIT 430, 1666 ROHRERSTOWN RD., LANCASTER, PA., 17601	INSIDE DEL & CALL AHEAD 717-560-0380	
KINNEY	WILLIAM	SSR	40559	1324	4	1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605			1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
MISCAVAGE	George	ASR	47450	1324	8	MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388	132424	MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388	
PAGE	Cynthia	ASR	71282	1324	10	Montage Tobacco, 632 Davis St., Scranton, PA. 18507		132421	Montage Tobacco, 632 Davis St., Scranton, PA 18507		
RUSCZYK	John	ASR	55435	1324	12	MS. MISTY BALLIETT, 116 E. PENN ST., MUNCY, PA., 17756	INSIDE DEL & CALL AHEAD 717-546-2743 DELIVER TO BARN IN REAR	132423	MS. MISTY BALLIETT, 116 E. PENN ST., MUNCY, PA., 17756	INSIDE DEL & CALL AHEAD 717-546-2743 DELIVER TO BARN IN REAR	
SPADONI	Anthony	ASR	73469	1324	9	Montage Tobacco, 632 Davis St. Scranton PA 18507		132424	MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA. 18507	INSIDE DEL & CALL AHEAD 717-342-3388	
WALSH	Myles B. Jr.	ASR	67051	1324	7	Montage Tobacco, 632 Davis St., Scranton, PA 18507		132421	Montage Tobacco, 632 Davis St., Scranton, PA 18507		
KERR Kaltenmoyer	GWEN A.	SRT	829430	1324	20	1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605			1324 DIV. OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
STOUDT	DIANA L.	SRT	827808	1324	20	Miller Dist. 300 S. 4th St St. Claire, PA 17970		132422	Miller Dist. 300 S. 4th St. St. Claire, PA 17970		
SNYDER	T. E.	GSW	831318	1324	XX	N/A			1324 DIV OFFICE- 280 CORPORATE DRIVE, READING, PA 19605		
MONAHAN	M.	GSW	810172	1324	XX	N/A			MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388	
MULRAIN	L.	PS	825745	1324	XX	SHIP & POST COUPONS TO ASR M. WALSH, TERR #07	MEMO REP # 67051		A-1 SELF STORAGE UNIT 630, REEVES & MONAHAN AVES., DUNMORE, PA., 18512		
OLENICK	M.	PS	825746	1324	XX	MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388		MONTAGE TOBACCO, 632 DAVIS ST., SCRANTON, PA., 18507	INSIDE DEL & CALL AHEAD 717-342-3388	

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PERSONNEL & ADMINISTRATION COORDINATOR

I NEW HIRE PAPERWORK

- Check Social Security Number, make sure not previous employee, then call Dot Draper for new employee number.
- Complete information in employment packet and HRIS Form and enter into SLRS.
- Send paperwork to Dot Draper via Airborne, copies to Sales Area and appropriate Division Manager.

II PAF and HRIS Maintenance

- Receive information from Division Manager
- Enter into SLRS.
- Print copy of changes and send to appropriate Division Manager.

III ADMINISTER VOICE MAIL

- Contact Mary Revish in W-S to add or delete any Voice Mail boxes.

IV TRACK HANDHELDS/EQUIPMENT

- Equipment serial numbers are listed by Divisions on a form - make changes as necessary when defective equipment is reported.
- Sales Rep calls office after calling Fastech to report defective piece of equipment. New equipment is then sent from Operations Div. to Sales Rep via UPS with letter of instruction for returning to Norand. (Surplus of good equipment is kept in Operations Office.)

V VEHICLE ADMINISTRATION

- Changes made on SIS (transfer of vehicle, license plate numbers, new vehicles, etc.).
- Handling of yearly registration, repair receipts, accident reports.

VI MANAGE PAYABLES (TPS)

- Receive bills and place in proper Division file.
- Pay bills once a week.
- TPS Report comes up on printer every Monday morning. Check against bills paid and file paid bills.
- TPS Weekly Reports kept in file by the month.

51846 7084

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VI MANAGE PAYABLES (TPS) - Cont'd.

- Draft book log kept on $500 and $5000 denomination books.
    - Order draft books thru SMS. When received record in draft book log.
    - Sales Rep submits form to request books.
    - Books recorded in log and on SIS and sent to Reps with letter.
    - Reps notify me via voice mail of receipt of books.

VII MAINTAIN OFFICE SUPPLIES

- Order supplies as needed or when requested by Operations personnel.

VIII MAINTAIN APPROPRIATE FILE

- All files have been set up on a color coded system. Each Division has a different color code and all files by each coordinator are kept in the same manner.

IX E-MAIL

- Pull up E-Mail twice daily and distribute to proper coordinator.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

Philadelphia Operations Division
3940-A Commerce Avenue
Willow Grove, PA 19090
215-659-8874
Fax 215-659-0623

TO: ____________________________

Attached is a label for mailing your defective hand-held to Fastech. It should be insured for $2,000. Charge up the cost under Postage on your Expense Report. Also enclose the attached letter.

Call Gerry in the Operations Division on Voice Mail (#57638) when the hand-held has been mailed and give me your name, division number, and the serial number of your defective hand-held which was returned to Fastech.

Any questions call Gerry in the Operations Division 215-659-6261.

Thanks!

51846 7086

"We work for smokers."

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

R. J. REYNOLDS
OPERATIONS DIVISION 1310
3940-A COMMERCE AVENUE
WILLOW GROVE, PA 19090
215-659-8874

Fastech, Inc.
450 Parkway Drive
Broomall, Pa. 19008

Re: Damaged Hand-Held
Serial # ________________
Division # ______________
Sales Rep Name ______________
Sales Rep Acct. # ______________

The enclosed hand-held is being returned for the following reason:

____

____

____

Please return the replacement to our Operations Department at the above address.

Thanks for your attention to this matter.

Sincerely,

Gerry Schmidt
Personnel & Administration
Coordinator

gms

51846 7087

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJReynolds
Tobacco Company

Philadelphia Operations Division
3940-A Commerce Avenue
Willow Grove, PA 19090
215-659-8874
Fax 215-659-0623

PLEASE NOTIFY ME VIA VOICE MAIL (57638) THAT YOU HAVE RECEIVED THESE BOOKS. (NAME, DIVISION/DISTRICT NUMBER, EMPLOYEE NUMBER, NUMBER AND DENOMINATION OF BOOKS AND DATE RECEIVED.)

THANK YOU!

Gerry Schmidt

Gerry Schmidt

51846 7088

"We work for smokers."

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

SYSTEMS COORDINATOR

I. Labor Reporting
   A. Removal of Hours from Labor Reporting Mail Box
   B. Recording Exceptions from Voice Mail
      1. Pay Roll Alterations Sheet
      2. Worktime Sheet
   C. Calculation of Miles for 2 Weeks
   D. Entry of Labor Reporting
   E. Letters for Adjustments that must be made at W/S

II. Expense Reports ~ green envelope
   A. Review
   B Correct (if possible)
   C. Entry

III. Sis Reports

IV. Review Pay Register
   A. Print and distribute Preliminary Pay Register
   B. Make all corrections
   C. Approve Pay Register

V. Chain Pay Register
   A. Print and distribute Preliminary Chain Pay Register
   B. Make all corrections
   C. Approve Pay Register

VI. Contract Maintenance
   A. Contracts entered into SIS Accounts
   B. Contracts filed in alphabetical order with 7101s

VII. 7101 Entry
   A. Front and back of 7101 must be filled in
   B. New entries may not be made unless accompanied by contracts
   C. S/C does not make changes that can be done on handheld

51846 7089

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VIII. Review Vending Pay Register

A. Print and distribute Prelimenary Vending Pay Register
B. Make corrections
C. Approve Vending Pay Register
D. Administer TruCheck

IX. Maintain Appropriate Files

A. Batch Reports
B. Manager's Bi-weekly Itinerary Report
C. Controllable Expense Reports
D. Part-time Sales Workers Call Report
E. Part-time Employee Report of Hours
F. Promotional Specialist Weekly Activity Recap Report
G. 7101s with Tax Information
H. Projected Contract Payments Report
    1. Pay Point
    2. Geographical
I. Retail Order Receipts
J. Jobber Receipts

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PAYROLL ALTERATIONS

Done	DIVISION	Name	Code	Dates/Explaination	Initials
	1328	McAden	P	1 hr 10-11-93	

51846 7091

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

WORKTIME	MON	TUE	WED	THU	FRI	HRS	MLS	MON	TUE	WED	THU	FRI	HRS	MLS	TOT HRS	TOT MLS
DIST #13	13	14	15	16	17			20	21	22	23	24				
BERKOWITZ	V	V	V	V	V											
SCHMIDT											V					
YOST																
COOPER	5			5			—									
GORDON	8.7	8.7	7					10	10	4	4					
DIST #1324	13	14	15	16	17			20	21	22	23	24				
COOK	—	—	—	—			—	—	—	—	—	—	—	—	—	—
HECKMAN	8	8	8	8		32	192	8	8	8			24	142		334
JOHNSON	—	—	—	—			—	—	—	—	—	—	—	—	—	—
LIMONGELLI	8	8	8	8		32	131	8	8	8	8		32	167		298
MANN		8	8	8		24	260		8	8	8		24	138		398
MULRAIN		8	8	8		24	86		8	8	8		24	117		203
RUHF		6	5.5	6	6.5	24	413		5.5	6	6	6.5	24	327		740
SHAY			8	4	8	20	32									32
SNYDER		8	8	7		23	—	8	6.5	8	8		30.5	—		
TOBEY			8	8		16	127		8	8	8		24	177		304
TOBIAS		8	8	8		24	54		8	8	8		24	174		228
VOLLWEILER		7.5	8.5	8		24	148		7.5	8	8.5		24	175		323
BRANDT																
BUEHLER																
CAREY																
CUSSATT																
GALLAGHER																
GILOTTY																
GIVENS																
HERLIHY																
KINNEY																
MILLER																
MISCAVAGE								Jury								
PAGE																
RUSCZYK																
SPADONI					[illegible]											
STOUDT																
WALSH																
DIST #1326	13	14	15	16	17			20	21	22	23	24				
BRANCH	6	6	7	7	6	32	77	8	8	6	6		28	71		148
BROWN	8	7	7	7	7	36	—	7.5	8.5	7	7	7	37	—		
CASCARINA	4	5	0	8	6		30									30
CRONAUER	6	-	4.5	6	6	22.5	69		5	6	6	6	23	52		121
KELLY	8.5		6.5	5		20	66									66
O'ROURKE	8	5	4	3	5		234	6	6	6	6	7		314		548
RENDINA	8	8	8	8	7	39	110	—	—	—	—	—	—	—		110
CAMP											V	V				
EVANS																
EWING																
MCDONALD								[illegible]								
NATALE																
SKVERSKY																
WIENER				V												
DIST #1327	13	14	15	16	17			20	21	22	23	24				
DEVLIN				S												
GOLDSBOROUGH																
MARSHALL								V								
MESSINA																
MINOR																
REED																
REISS																
RIDGE																
SMITH																
TAYLOR	V	V	V	V	V											
WOTHERS																
YARRUSSO	V	V														
DIST #1328	13	14	15	16	17			20	21	22	23	24				
BERARDI	8	6	6	8		28	294	8	8				16	174		468
CONSTANTINE	8	8	6.5	7		29.5	241	5	6	6	6	6	29	231		472
GLANFIELD	6.5	5.5	4	2.5	5	23.5	107	4.5	5	4	4.5	4.5	22.5	131		238
HUDSON	6	6	—	7	8	27	81	—	8	6	6	8	28	100		181
NEDEROSTEK	8	8	8	8	7	39	332	8	8	8	8	7	39	339		671
SCRIGNOLI	8	8	8	8	6.5	38.5	304	8	8	8	8	6.5	38.5	309		613
TORRIERO	6	8	8	8	8	38	266	8	8	8	8	6	38	307		573
FRIEND																
LISA																
LYNCH																
MCADEN					[illegible]											
STEELE																
VETTOREL																
WINN																
DIST #1329	13	14	15	16	17			20	21	22	23	24				
HINES	8	8	8	8	6	38	231	8	8	8	8	6	38	252		483
WODLINGER	8		8	8	8	32	180	8		8	8	8	32	117		297

51846 7092

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MANAGER'S BI-WEEKLY ITINERARY REPORT

NAME: P. Bilotty

WEEK ENDING DATE: 9/17

WEEK 1

DAY	DATE	DIVISIONS	TIME FRAME	DESCRIPTION OF ACTUAL ACTIVITY
MONDAY	9/13	1324	AM/PM	Vacation
TUESDAY	9/14	1324	AM/PM	Office - Admin duties
WEDNESDAY	9/15	1324	AM/PM	Direct Accounts [illegible], Klein, [illegible]
THURSDAY	9/16	1324	AM PM	Klein Candy D/A NHRA Drag Race Tournament
FRIDAY	9/17	1324	AM/PM	W/W S/R R. Amant
SATURDAY				
SUNDAY	9/19	1324	AM/PM	Keystone National Drag Race

WEEK ENDING DATE: 9/24

WEEK 2

DAY	DATE	DIVISIONS	TIME FRAME	DESCRIPTION OF ACTUAL ACTIVITY
MONDAY	9/20	1324	AM/PM	Regional Meeting
TUESDAY	9/21	1324	AM/PM	Cooper Booth Wholesale Klein Candy
WEDNESDAY	9/22	1324	AM/PM	W/W ASR T. Cussatt
THURSDAY	9/23	1324	AM/PM	W/W ASR Givens
FRIDAY	9/24	1324	AM/PM	Division Meeting
SATURDAY				
SUNDAY				

51846 7093

Attach Completed Copy with Bi-Weekly Expense and Payroll Report.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PART TIME EMPLOYEE REPORT OF HOURS

DIVISION # 1332

EMPLOYEE NAME & NUMBER Karen Ryan - 827162

EMPLOYEE SIGNATURE Karen Ryan

(THIS REPORT OF HOURS MUST BE SIGNED ABOVE BY THE EMPLOYEE)

INSTRUCTIONS: UPON COMPLETION OF YOUR WORK WEEK, BUT BEFORE MIDNIGHT SUNDAYS, FILL IN THE INFORMATION BELOW FOR THE WORK WEEK JUST COMPLETED.

WEEK ENDING: 9/3/93	HOURS	WEEK ENDING:	HOURS
MONDAY	8½	MONDAY	
TUESDAY	8½	TUESDAY	
WEDNESDAY	2½	WEDNESDAY	
THURSDAY	8	THURSDAY	
FRIDAY		FRIDAY	
WEEK #1 TOTAL	27½	WEEK #2 TOTAL	
WEEK #1 MILES	99	WEEK #2 MILES	

BI-WEEKLY TOTAL # HOURS

BI-WEEKLY TOTAL # MILES

AFTER FILLING IN THE INFORMATION ABOVE, CALL ONE OF THE FOLLOWING PHONE NUMBERS AND FOLLOW INSTRUCTIONS TO REPORT YOUR WEEKLY HOURS AND MILES TO THE LABOR REPORTING LINE:

-FROM ABINGTON, AMBLER, WILLOW GROVE, CHELTENHAM, ELKINS PARK, HATBORO, FEASTERVILLE, JENKINTOWN, WARRINGTON, ROSLYN, OR HUNTINGDON VALLEY PHONE:

659-6112

-FROM ALL OTHER AREAS OF PENNSYLVANIA AND NEW JERSEY, AND DELAWARE PHONE:

1-800-546-5297

IMMEDIATELY AFTER CALLING IN YOUR HOURS FOR THE SECOND WEEK OF THE PAY PERIOD, MAIL IN THIS TIME SHEET - THIS IS MANDATORY.

51846 7094

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PHILADELPHIA REGIONAL OPERATIONS UNIT ASSESSMENT

8/18/93

SYSTEMS COORDINATOR		
RESPONSIBILITY	Hrs/Week	COMMENTS
Review Pay Register	2.20	28 Hours per Qtr
Review Vending Register	1.20	16 Hours per Qtr
7101 Entry	4.00	
Contract Maintenance	4.00	
Maintain Appropriate Files	4.00	Includes filing of Managers Weekly Itinerary and Part-time Activity Reports
Manage Labor Reporting	8.00	
Enter Expense Reports	12.00	
Oversee SIS Reporting	2.00	
Opti-Scan Coordination	0.00	Program eliminated
TOTAL	37.40	

51846 7095

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
Batch Job Submission

Batch jobs can be submitted two ways:

1)  Nighttime submission will submit the job to run after
    8 P.M.  Output will be routed as normal, and would be available
    the next morning.

2)  Prime Shift submission will submit the job immediately.
    The job will run as soon as resources permit, output will be
    routed as normal.

In order to encourage Nighttime submission the billing structure
has been changed so that Nighttime jobs will be charged at roughly
half of Prime Shift jobs.

For this reason, unless there is an immediate business need for a
job to be run on Prime Shift,  Jobs should be submitted Nighttime.

DO YOU WANT NIGHTTIME SUBMISSION FOR THIS JOB? Y ('Y' OR 'N'; OR 'C' TO CANCEL)
```

16. You will be returned to the *Special Reviews* screen. If you printed the letter, the message

    JOB XXXX SUBMITTED SUCCESSFULLY

    will be displayed.

17. After reviewing a hard copy of the printed letter you may make changes to the letter by following the procedures on Inquiring and Changing Reprimands.

18. To exit from the *Special Performance Review Update* screen, press [PF5]. With the first Special Performance Review Update screen displayed, [TAB] to the FUNCTION field and enter 999. You will be returned to the PDS signon screen. Press [PF1] to exit to the CESF LOGOFF screen. Press [ENTER] again to return to the MSG10 screen.

51846 7096

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Inquiring About an Existing Reprimand

1. Logon to PDS. In the selection line, enter REPRIMAND and press [ENTER]. The following screen will be displayed.

```
10/15/92   13:04          Special Reviews - Sales                 GLJ510R
==========================================================================
Account:                                Job:
Location: 000                           Dept:               Pay:
Service Date:
----------------------------- List of Reviews ----------------------------
Sel  Rev-Date  App Att  Manager                 Typ Reason




==========================================================================
Social Security Number: _________      Selection: __       Account: _____
Function 510
Func 512 for new review       PF6 Detail/Modify (Make selection)    PF1 Help
```

2. Enter either the employee's social security number (with dashes) or account number in the SOCIAL SECURITY NUMBER or ACCOUNT fields and press [ENTER].

51846 7097

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. If this account has special reviews associated with it, they will be displayed on the screen.

```
10/15/92   13:04           Special Reviews - Sales                  GLJ510R
===========================================================================
Account: 123456  WOOD, HOLLY          Job:    14007 PROMOTIONAL SPECIALT
Location: 000 FS  Field Sales         Dept: 4336              Pay: 2
Service Date: 07-19-1991
---------------------------- List of Reviews ------------------------------
Sel  Rev-Date  App Att  Manager                     Typ Reason
 1  09-20-1992  R   N    39969                      Rep PERFWR
 2  09-14-1992  A   N    39969                      Rep DRUGTM
 3  09-04-1992  A   N    39969                      Rep DRUGWR




===========================================================================
Social Security Number: 123-45-6789      Selection: __       Account: 123456
Function 510
Func 512 for new review      PF6 Detail/Modify (Make selection)      PF1 Help
```

4. To view the details associated with a reprimand, enter the SEL number that corresponds to the reprimand you wish to view in the SELECTION field and press [PF6].

51846 7098

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The *Special Performance Review Update* screen will be displayed.

```
10/15/92   13:09     Special Performance Review Update - Sales       GLJ515U
============================================================================
Account: 123456 WOOD, HOLLY        Job:    14007 PROMOTIONAL SPECIALT
Location: 000 FS  Field Sales       Dept: 4336               Pay: 2
Service Date: 07-19-1991
============================================================================

Review Type: R      Reprimand
Reason      : PERFWR Performance Written Reprimand
Manager     : 234567 STAN BACK
Review Date: 09-20-1992

Approval Status: R

Enter Comments(Y/N): N
----------------------------------------------------------------------------
Entered-By: WHGAB 09-23-1992 14:17 GCC6      345678  VADER, GARTH
Changed-By: WHGAB 10-07-1992 13:59 GCC6      456789  STEIN, FRANK N
Approval-1: WHGAB 10-07-1992 13:58 GCC6      456789  STEIN, FRANK
Approval-2:
============================================================================
                 Attachment: N        Display Form:          Print Form:
PF1 Help     PF2 N/A     PF3 Update     PF4 Delete     PF5 Return (no action)
```

6. This screen indicates the review reason, the employee's manager, the review date and the approval status level. On the lower half of the screen, the names of the individuals who have entered or changed the reprimand are displayed.

51846 7099

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. To view (inquire only) the letter associated with this reprimand, [TAB] to the DISPLAY FORM field, enter a Y (capital Y) and press [ENTER]. The system will display the reprimand letter. Procedures for editing the letter occur beginning with step 10 of this section. You are advised to review the letter first and to print a copy of the letter before making edits. Since the text screen does not scroll forward, if you insert additional comments over existing text, you will need the original hard copy of the document to rekey comments on subsequent pages.

TO: HOLLY W. WOOD
SSN [redacted]
ACCT: 123456

FROM: STAN BACK

SUBJECT: Performance Written Reprimand

The purpose of this report is to document the corrective action being issued to you due to your sub-standard performance relating to the following:

Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here. Explanatory text goes here.

More explanatory text goes here. More explanatory text goes here. More explanatory text goes here. More explanatory text goes here. More explanatory text goes here.

51846 7100

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. Press [ENTER] to page through the letter and return to the Special Performance Review Update screen. If you wish to print the form letter, [TAB] to the PRINT FORM field, enter Y (capital Y) and press [ENTER]. The following screen will be displayed.

```
11:06  10/16/92              Special Performance Form               CLJS15H



                         Send Output To: VADER, GARTH
                               Printer: U1011


-------------------------------------------------------------------------------
Function: ___                                                      Submit? Y
```

51846 7101

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

9. To print the letter, just press [ENTER]. (You do not have to enter anything in the FUNCTION field.) The following batch job submission screen will be displayed. Note that the default is set to print at night to reduce costs. If you absolutely must review the letter immediately, change the indicator on this screen to N. To cancel the print request, enter a C.

```
                         Batch Job Submission

Batch jobs can be submitted two ways:

1)  Nighttime submission will submit the job to run after
    8 P.M.  Output will be routed as normal, and would be available
    the next morning.

2)  Prime Shift submission will submit the job immediately.
    The job will run as soon as resources permit, output will be
    routed as normal.

In order to encourage Nighttime submission the billing structure
has been changed so that Nighttime jobs will be charged at roughly
half of Prime Shift jobs.

For this reason, unless there is an immediate business need for a
job to be run on Prime Shift,  Jobs should be submitted Nighttime.


DO YOU WANT NIGHTTIME SUBMISSION FOR THIS JOB? Y ('Y' OR 'N'; OR 'C' TO CANCEL)
```

10. You will be returned to the Special Reviews screen. If you printed the letter, the message

JOB XXXX SUBMITTED SUCCESSFULLY

will be displayed.

51846 7102

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Making Changes

11. You may only make changes to those reprimands which have not already been approved by a higher level. Once a reprimand has been approved by the Region, Sales Area or Home Office, then it cannot be edited by the Division. You may change the review type, reason, manager, review date, approval status and comments. For example, to change the reprimand reason [TAB] to the REASON field. Press [PF1] for a list of reprimand reasons and select the reason you wish to change to by entering an X beside your selection and pressing [ENTER].

```
10/15/92   13:52     Special Performance Review Update - Sales        GLJ515U
-----------------                                                     -----------
Account: 826354 W                                                     ECIALT
Location: 000 FS              REPRIMAND CODES                         2
Service Date: 07-
-----------------      Code      Description                          -----------
                       DRUGFW    Alcohol/Drug Final Warning
Review Type: R         DRUGTM    Alcohol/Drug Termination
Reason     : PERF      DUCTFW    Misconduct Final Warning
Manager    : 3996      DUCTTM    Misconduct Termination
Review Date: 09-2      DUCTWR    Misconduct Written Reprimand
                       FALSFW    Falsification Final Warning
Approval Status:       FALSTM    Falsification Termination

Enter Comments(Y/
                       You may select a reason code by placing
Entered-By: WHGAB      'X' next to your choice.
Changed-By: WHGAB                                                     C
Approval-1: WHGAB      Press Enter for continuous scrolling of        C
Approval-2:            all reprimand reason codes.
-----------------                                                     -----------
                       PF5 - Return                                   Int Form:
PF1 Help     PF2                                                      (no action)
```

12. The system will update the screen with your changes. If you wish to update the comments associated with this reprimand, enter a Y in the ENTER COMMENTS field and press [PF3].

   - *Note:* You are advised to have a hard copy of the comments available before making revisions to the screen.

   - *Note:* The introduction and the concluding remarks of the reprimand or termination letter have already been created for you. They will appear at the top and the bottom of the printed letter automatically but will not appear on the screen. For example, the shaded areas in the following letter are provided by the system. The comments you enter using the free-form comments field will comprise the body of the letter. The example below is a termination letter. Refer to the previous section for an example of a reprimand letter.

51846 7103

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Introduction is supplied by the system →

The purpose of this report is to document the termination of your employment due to your sub-standard performance relating to the following.

You will enter the body of the letter using the free-form comments field →

The comments you type in the free-form comments field will appear in the body of the letter.

Conclusion is supplied by the system →

Based on all of the above, your employment is being terminated effective immediately. As of this date I have read and discussed this report with you, and you have been given the opportunity to sign the report and attach any comments you may have. It is understood that this document will be placed in your personnel file, and that you will be given a copy for your records.

Manager_______________ Date ________

Employee _______________ Date ________

Original to Sales Employment Practices Manager, Winston-Salem
CC: Regional Manager

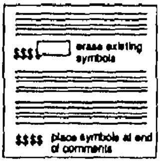
51846 7104

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

13. The free-form comments field will be displayed.

```
10/15/92      Comment Screen for  BRANNON, JAMES C

                          Sales Special Review
                                Screen 1
  THIS IS SOME TEXT
  $$$$
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________
  ________________________________________________

Paging F  (F)orward  (B)ack  (E)nd             Update N  (Y)es  (N)o
```

14. Make edits to comments by keying over or adding to the data displayed. If you need additional space, make sure an F is displayed in the PAGING field at the bottom of the screen and press [ENTER]. You may page back and forth through the comment screens by entering B for Back and F for Forward.



15. When your entry is complete, you must move to the last line and enter $$$$ to indicate that the review comments are completed. If you are editing comments that exceed the existing comments, erase the existing $$$$ symbols and put them on the last line of the new revised comments. This tells the system where to place the standardized comments in the form letter, eliminating any excess space.

16. Enter an E in the PAGING field and a Y in the UPDATE field and press [ENTER]. The system will update the form letter with your changes. The letter will be displayed on line as it will appear in print. Press [ENTER] to review this information. You will be returned to the Special Performance Review Update screen. Note that your name and ID will appear in the CHANGED-BY field.

17. To exit from the Special Performance Review Update screen, press [PF5]. With the first Special Performance Review Update screen displayed, [TAB] to the FUNCTION field and enter 999. You will be returned to the PDS signon screen. Press [PF1] to exit to the CESF LOGOFF screen. Press [ENTER] again to return to the MSG10 screen.

51846 7105

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Approving a Reprimand

1. Locate the review for which you wish to enter approvals. After reviewing the account, [TAB] to the APPROVAL STATUS field and enter one of the following approval codes.

   S - Approval at Division Level
   R - Approval at Region Level
   A - Approval at Sales Area
   + - Approval at Home Office

2. Press [PF3] to update this record. The system will display the reprimand letter. Press [ENTER] to page through the letter. You will be returned to the Special Performance Review screen where the system will display your name and ID in the approval area.

```
10/15/92   13:09     Special Performance Review Update - Sales       GLJ515U
----------------------------------------------------------------------------
Account: 123456 WOOD, HOLLY        Job:    14007 PROMOTIONAL SPECIALT
Location: 000 FS  Field Sales        Dept: 4336              Pay: 2
Service Date: 07-19-1991
----------------------------------------------------------------------------

Review Type: R      Reprimand
Reason      : PERFWR Performance Written Reprimand
Manager     : 234567 STAN BACK
Review Date: 09-20-1992

Approval Status: R

Enter Comments(Y/N): N
____________________________________________________________________________
Entered-By: WHGAB 09-23-1992 14:17 GCC6     345678  VADER, GARTH
Changed-By: WHGAB 10-07-1992 13:59 GCC6     456789  STEIN, FRANK N
Approval-1: WHGAB 10-07-1992 13:58 GCC6     456789  STEIN, FRANK
Approval-2:
----------------------------------------------------------------------------
                   Attachment: N        Display Form:         Print Form:
PF1 Help     PF2 N/A     PF3 Update     PF4 Delete     PF5 Return (no action)
```

3. You may continue changing and approving reprimands. To exit from this screen, press [PF5]. You will be returned to the first Special Performance Review screen. Enter 999 in the FUNCTION field and press [ENTER]. You will be returned to the PDS menu. To exit from PDS, press [PF1]. The CESF LOGOFF screen will be displayed. Press [ENTER] again to return to the MSG-10 screen.

51846 7106

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

New Hire Administration

The Operations Unit and its Personnel & Administration Coordinator are responsible for processing paperwork for new hires. In each case, Division, Chain or Region Management has recruited and interviewed new hires, and has extended a formal job offer. The PC is charged with handling the paperwork associated with the processing of these new full-time and part-time hires. This processing includes instructing the new hire how to complete forms, serving as the "witness" as needed, entering information into PDS and forwarding any administration to the Home Office Personnel Department.

The Region Operations Manager should determine in which cases the Operations Unit will handle this new hire paperwork, as which cases Division/Chain/Region personnel will process the paperwork. It may not always be reasonable or feasible to have new hires travel to the Operations Unit to complete new hire forms. In these cases, it may make more sense to have this administrative procedure handled by affected Division personnel.

- *Note:* The selection process must be complete when the new hire arrives at the Operations Unit to complete administration. The PC's responsibility is to process paperwork, not to make hiring decisions.

Processing New Hires

- The minimum age for new hires is 21 years old
- Individuals may not be employed in any position where they will be supervised directly or indirectly by immediate family members within their operation unit.
- To ensure the new employee is set up for processing salary and expenses for the first week, EMPLOYMENT PAPERS MUST BE SENT TO SALES PERSONNEL, WINSTON-SALEM, THE WEEK PRIOR TO THE FIRST WORK WEEK.
- Provided employment papers are received for the current biweekly process-cycle, employee account numbers can be retrieved via SES by Thursday of the first week of employment.
- The Operations Unit will be notified of any missing or incomplete employment documents required for permanent records.

1. When Management makes a job offer, the Operations Unit and PC should be contacted to set up an appointment to process all paperwork. Once determined, the Manager should communicate this time to the new hire.
2. Prior to the appointment, the PC should gather a New Hire Packet. This packet contains forms which need to be completed by the new hire.

- Utilize checklist for processing Filed Sales New Hire and Rehires. This checklist assists the PC to ensure all appropriate forms are complete.

51846 7107

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

EMPLOYMENT FORMS COMPLETION LIST

Important: The following forms must be completed and mailed to your P&A **at least one week** prior to date employee begins work. Please use check list below to ensure forms are properly completed and mailed.

Date Forms Mailed ____________________ Date Employee Starts Work ____________________

Part-Time	Temp Full-Time	Regular Full-Time	**FORWARD IN SALES PERSONNEL ENVELOPE**
☐	☐	☐	Field Sales Employee Agreement (Form 104) [1]
☐	☐	☐	Application (Form 1456)
☐	☐	☐	HRIS New Hire Form (Form 7158)
☐	☐	☐	Federal W-4 or W4A and any applicable state tax forms
☐	☐	☐	Information for Tax Purposes (Form 8822)
☐	☐	☐	Emp. Invention/Confidentiality Agreement (Form 2399)
☐	☐	☐	Employee Eligibility Certification Form I-9 (Form 147)
☐	☐	☐	Authorization for Automatic Deposit (Form 6281) [2]
	☐	☐	Copy of Birth Certificate
☐	☐	☐	Copy of Social Security Card
☐	☐	☐	Copy of College Diploma or Proof of Degree (if applicable)
	☐	☐	Copy of Military Discharge (Form DD214 - if applicable)
		☐	Acknowledgement of Receipt and Understanding Employee Handbook
☐	☐		Conditions for P/T, Temporary Employment (Form 5563)
			FORWARD IN INTERCOMPANY ENVELOPE
		☐	Application Card, Multi-Med Insurance (Form 5514)
		☐	Acceptance — Optional Group Life Insurance (Form 3859) **OR**
		☐	Waiver — Optional Group Life Insurance (Form 3862)
		☐	Beneficiary Design - Non-Contribution Group Life (Form 5517)
		☐	Dental Expenses Plan Enrollment Card (Form 5401)

51846 7108

NOTES: [1] Form 104 is critical; no account number can be assigned without a completed and signed form.
[2] Optional, but Regular and Temporary employees may request

APPENDIX D

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Certain forms require the PC to serve as a "witness". The PC should review all forms to familiarize themselves with these forms.
- Certain forms require a Division Management signature:
  - For new hires signing paperwork AT THE OPERATIONS UNIT, Region Operations Manager's signature will serve as "Division Manager" signature.
  - For new hires signing paperwork WITH DIVISION MANAGEMENT, the manager should sign all blanks as indicated.

51846 7109

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. Once all employment papers are completed per requirements, the PC must enter the PDS system to set up new employee information and files. Ensure checklist in New Hire Kit is complete before entering PDS.

Adding a New Hire

Please follow the guidelines for hiring new employees in the Personnel Policy and Procedures manual in the Personnel Administration Section.

- **Complete The Checklist First...**

  Use the checklist in Appendix A for the account numbers and to verify that you have collected all mandatory forms. Insert this form in the Personnel File with all mandatory forms. **You should complete this before making entries in the system.**

- **Obtain Account Numbers...**

  To obtain account numbers, please call Dot Draper in Sales Personnel at (919) 741-2339.

Adding a New Hire to PDS

1. Logon to PDS. In the selection line, type **PDS01** and press [ENTER]. The Personnel Functions menu will be displayed. A window will be displayed requesting the employee social security number. Enter the social security number and press [ENTER].

```
P D S                      PDS INQUIRY/UPDATE                          PDS**
-----------------------------------------------------------------------------
    Func      Description                   Func      Description
    -----  ----------------------------     -----  --------------------------
  1 PDS01 EMPLOYEE MAINTENANCE
  2 PDS02 OPERATOR BALANCE AND RELEASE
  3 PDS03 PDS FUNCTIONAL SECURITY

          Employee Retrieval and Maintenance

          Employee SSNO: 123456789

          Last Name: ______________

          First Name: ______________

PDS900M  Selection:pds01                                    02-19-1993 10:02
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Sel     Exit        Zoom                                    Help
```

51846 7110

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. An additional window will be displayed indicating that the employee could not be found in the system. Press [ENTER] to hire this employee.

```
P D S                        EMPLOYEE MAINTENANCE                        PDS01
------------------------------------------------------------------------------
SSNO:                                                    Corp:      Stat:
------------------------------------------------------------------------------
First Name:        ________ Initials:  _ Last Name:  _______________

                  SSNO: 123456789    Account;

        No employee was selected from
        the active or archive file.

        Press <ENTER> hire this
        employee or '99' to exit.

        Selection: __

PDS00153 Command: _____________________________________     02-19-1993 10:12
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

3. The screen will be similar to the following. You must enter information for the employee.

```
ENTER INFORMATION FOR NEW EMPLOYEE
P D S                        EMPLOYEE MAINTENANCE                        PDS01
------------------------------------------------------------------------------
SSNO: 123456789   ,                                      Corp:      Stat: 10
------------------------------------------------------------------------------
First Name: ______________ Initials: _ Last Name: ________________________

                  SSNO: 123456789__ Account: __________

          Home Address: ________________________
                        ________________________
                  City: ________________ State: _ Zip: ________

             Residence: ____________   Province: ____________

            Home Phone: __________

            Work Phone: __________

PDS00153 Command: _____________________________________     02-19-1993 10:16
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

51846 7111

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Following is a sample of a completed screen. Be sure to enter information in all fields as shown. You should not enter dashes, periods or commas on this screen. Enter all 10 numbers for the telephone like this 9193446543, not (704) 344-6543.

```
ENTER INFORMATION FOR NEW EMPLOYEE
 P D S                          EMPLOYEE MAINTENANCE                    PDS01
------------------------------------------------------------------------------
SSNO: 123456789   ,                                          Corp:    Stat: 10
------------------------------------------------------------------------------
First Name: HOLLY_________ Initials: W_ Last Name: WOOD_______________________

                 SSNO: 123456789__ Account: 123456_____

         Home Address: 88 SIXTH STREET__________
                       _________________________

                 City: LINCOLN__________  State: NC Zip: 23412___

            Residence: _____________    Province: _____________

           Home Phone: 7043446543___

           Work Phone: __________

 PDS00153 Command: ______________________________________      02-19-1993 10:16
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

51846 7112

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Press [ENTER]. The following screen will be displayed.

```
ENTER INFORMATION FOR NEW EMPLOYEE
 P D S                         EMPLOYEE MAINTENANCE                      PDS01
------------------------------------------------------------------------------
SSNO: 123456789  WOOD, HOLLY W                               Corp:    Stat: 10
------------------------------------------------------------------------------

              Credit Cards  Auto: _   Air: _ Phone: _   Gas: _ Am Ex: _

               Citizenship: ____________ ____________

                 Languages: __ __ __ __

               Work Permit: _____      Expires: ________
                      Visa: _____      Expires: ________
                  Passport: _____      Expires: ________

Expatriate: _ Img: _ SIP: _ VSIP: _ Accident Ins: _ Sickness Ins: _ Death: _

Travel Allowance: ________________________   Officer Code: __
     Company Car: ___

PDS001SG Command: __________________________________________ 02-19-1993 10:22
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit              Updt                Back  Fwd   Help
```

If the employee is not a US Citizen

6. If this employee is not a US Citizen, type the name of the country in the CITIZENSHIP field. [TAB] to the VISA field and enter the visa or alien number. The number will look like A0123456789. You only need to key A123456789 (in other words, leave off the leading zero on the number). This information may be located on the Green Card and the I9 (employee verifications form).

51846 7113

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. If the employee is a US Citizen, press [ENTER]. The following screen will be displayed.

```
ENTER INFORMATION FOR NEW EMPLOYEE
  P D S                      EMPLOYEE MAINTENANCE                    PDS01
===========================================================================
 SSNO: 123456789   WOOD, HOLLY W                           Corp:   Stat: 10
===========================================================================

            Birth Date: ________

                 Race: _ Sex: _ Marital Status: _ Vet: 0 Handicap: 0

           Spouse SSNO: _________ Birth Date: ________
             Last Name: _____________________ First Name: ____________

     Emergency Contact: ___________________________ Relation: _______
               Address: _____________________
                 Phone: __________

 PDS00154 Command: _____________________________________ 02-19-1993 10:25
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit  Read        Updt        Bal   Back  Fwd   Help  Comp  Aud   Empl
```

51846 7114

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Enter birthdate and emergency contact info

8. Complete the information on this screen. Below is an example of a completed screen. The birthdate **must** be entered with dashes on this screen. The full year must also be entered. The phone number should have no dashes or parenthesis. Press [ENTER].

```
P D S                          EMPLOYEE MAINTENANCE                          PDS01
----------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                                Corp:    Stat: 10
----------------------------------------------------------------------------------

         Birth Date: 11-11-1960

              Race: W Sex: F Marital Status: S Vet: 0 Handicap: 0

        Spouse SSNO: _________ Birth Date: _________
          Last Name: ____________________ First Name: ____________

  Emergency Contact: BURL WOOD________________ Relation: FATHER__
            Address: ____________________
              Phone: 3044554321__

PDS001S4 Command:                                              02-19-1993 10:25
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read        Updt        Bal   Back  Fwd   Help  Comp  Aud   Empl
```

51846 7115

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

9. The following screen will be displayed.

```
P D S                        EMPLOYEE MAINTENANCE                          PDS01
--------------------------------------------------------------------------------
SSNO:123456789   WOOD, HOLLY W                              Corp:     Stat: 10
--------------------------------------------------------------------------------
Education

Highest Education: _                                        Year: ___
           School: __
          Subject: __

   Next Education: _                                        Year: ___
           School: __
          Subject: __

In Prog Education: _                                        Year: ___
           School: __
          Subject: __
                   Credits Required: __  Earned: __
PDS001SE Command: ____________________________________________ 02-19-1993 10:31
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit             Updt                    Back  Fwd   Help
```

Enter education codes

10. Enter the information as shown in the following example. Refer to the code book for the proper education code. You should not enter in college or graduate degrees without a copy of the diploma or proof of degree. Press [ENTER].

```
ENTER INFORMATION FOR NEW EMPLOYEE
 P D S                        EMPLOYEE MAINTENANCE                         PDS01
--------------------------------------------------------------------------------
SSNO: 123456789  WOOD, HOLLY W                              Corp:     Stat: 10
--------------------------------------------------------------------------------
Education

Highest Education: 14                                       Year: 1978
           School:
          Subject: h10

   Next Education: _                                        Year: ___
           School: __
          Subject: __

In Prog Education: _                                        Year: ___
           School: __
          Subject:
                   Credits Required: __  Earned: __
PDS001SE Command: ____________________________________________ 02-19-1993 10:46
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit             Updt                    Back  Fwd   Help
```

51846 7116

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

11. The following screen will be displayed.

```
ENTER INFORMATION FOR NEW EMPLOYEE
 P D S                         EMPLOYEE MAINTENANCE                         PDS01
---------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                               Corp:     Stat: 10
---------------------------------------------------------------------------------
Prior Employment              Source: __

                    Company          From   Thru         Duties
              ------------------    -----  -----  --------------------
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
              __________________    _____  _____  ____________________
PDS001SD Command:                                              02-19-1993 10:51
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit              Updt                              Help
```

Enter employment source and previous employment

12. Enter the employment source using one of the following codes:

AD	Advertisement
BR	Business Referral
CA	College & University/Alumni Placement
CR	College Recruitment
CS	College & University/Student Placement
EA	Employment Agency
EM	Employment Agency - Minority
ES	Executive Search Firm/Consultants
FE	Former Employee
GF	Government Agency/Federal
GL	Government Agency/Local
GS	Government Agency/State
PS	Professional Societies
RI	Write In
RN	Employee Referral/Non-Relative
RR	Employee Referral/Relative
UR	Unsolicited Resumé
WI	Walk In

51846 7117

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

13. Enter employee's previous employment by entering the name of the company, from and through dates and job (e.g., manager, secretary) under duties. Press [ENTER].

```
ENTER INFORMATION FOR NEW EMPLOYEE
 P D S                          EMPLOYEE MAINTENANCE                    PDS01
==============================================================================
 SSNO: 987654321   WOOD, HOLLY W                            Corp:    Stat: 10
==============================================================================
 Prior Employment              Source: ad

                   Company          From   Thru        Duties
               ----------------   -----  -----   -----------------
               AT&T               11-91  12-91   operator

 PDS001SD Command:                                          02-19-1993 10:51
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit            Updt                              Help
```

14. The status screen will be displayed.

```
VERIFY NEW HIRE
 P D S                         EMPLOYEE MAINTENANCE                     PDS01
==============================================================================
 SSNO: 987654321   WOOD, HOLLY W                            Corp:    Stat: 10
==============================================================================
                                                                      Page: 1
 Status Date   Trans  Status
 ----------     ---     --

 02-19-1993    101     10        NEW-HIRE REGULAR

                                        Hire Date: 02-19-1993
                                     Service Date: 02-19-1993
                                 Termination Date:

                                         Last Day:
                                Leave Expire Date:
                                       Erisa Date:

 PDS001SA Command:                                          02-19-1993 11:04
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom                        Back  Fwd   Help        Aud
```

51846 7118

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Enter status date and transaction code

15. In the STATUS DATE field, change the date to the effective date of new hire and make sure the correct trans code is displayed. Valid codes are:

- 101 - New Hire Regular Full Time
- 109 - New Hire Part Time (general sales worker, promotional specialist, Materials Coordinator, part-time secretary)
- 111 - New Hire Temp Fill In (Sales Rep Temp)

Press [ENTER].

```
VERIFY NEW HIRE
 P D S                       EMPLOYEE MAINTENANCE                     PDS01
***************************************************************************
SSNO: 987654321   WOOD, HOLLY W                          Corp:     Stat: 10
***************************************************************************
                                                                    Page: 1
 Status Date   Trans  Status
 ----------     ---    --

 02-02-1993    101     10    NEW-HIRE REGULAR

 __________    ___                   Hire Date: 02-02-1993
 __________    ___                Service Date: 02-02-1993
 __________    ___            Termination Date: __________
 __________    ___
 __________    ___                    Last Day: __________
 __________    ___           Leave Expire Date: __________
 __________    ___                  Erisa Date: __________
 __________    ___
 __________    ___
PDS0015A Command: ____________________________________     02-19-1993 11:04
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                        Back  Fwd   Help        Aud
```

16. The system will update the screen with your changes.

51846 7119

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

17. Press [ENTER] again. The following screen will be displayed.

```
ENTER RATE FOR NEW EMPLOYEE
  P D S                          EMPLOYEE MAINTENANCE                        PDS01
----------------------------------------------------------------------------------
 SSNO: 987654321   WOOD, HOLLY W                                 Corp:   Stat: 10
----------------------------------------------------------------------------------
                                                                         Page: 1
  Sal Date   Rsn  Annual    Prd      Incr          Rate       Pct  Pay Compa
  ---------- -  --------- --- ------------- ------------- ----- -   ---

  02-02-1993 E  _________ ___ _____________ _____________ _____ _   ___




  PDS001S8 Command: ________________________________________  02-19-1993 11:08
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
  Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

51846 7120

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Enter Biweekly rate and payroll number

18. Enter the Biweekly rate in the RATE field and enter the payroll number (2) in the PAY field as shown below. Press [ENTER].

```
ENTER RATE FOR NEW EMPLOYEE
 P D S                       EMPLOYEE MAINTENANCE                    PDS01
==========================================================================
SSNO: 987654321   WOOD, HOLLY W                       Corp:      Stat: 10
==========================================================================
                                                                   Page: 1
Sal Date   Rsn  Annual   Prd    Incr          Rate      Pct  Pay Compa
---------- -  ---------  ---  ------------  ------------ ----- -   ---

02-02-1993  E  _________ ___ ____________     950.00    ____ ___  2  ___




PDS00158 Command: ___________________________________     02-19-1993 11:08
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                        Back  Fwd   Help        Aud
```

19. The job screen will be displayed.

```
ENTER JOB FOR NEW EMPLOYEE
 P D S                       EMPLOYEE MAINTENANCE                    PDS01
==========================================================================
SSNO: 987654321   WOOD, HOLLY W                       Corp:      Stat: 10
==========================================================================
                                                                   Page: 1
Job Date   Rsn Job Code     Title              Grade FLSA EEO Func  EEO Grp St
---------- -   --------  ------------------   ----- ---- --- ----- --- ---- -

02-02-1993  E  00000000                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
__________  -  ________                                                     -
PDS00159 Command: ___________________________________     02-19-1993 11:10
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                        Back  Fwd   Help        Aud
```

51846 7121

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Enter job number

20. Enter the job number in the JOB CODE field. When keying the job number always enter the company code (e.g., 004) plus the job code (e.g., 14021) as 00414021. Refer to example below. Press [ENTER].

```
ENTER JOB FOR NEW EMPLOYEE
 P D S                          EMPLOYEE MAINTENANCE                  PDS01
===========================================================================
SSNO: 987654321   WOOD, HOLLY W                          Corp:     Stat: 10
===========================================================================
                                                                    Page: 1
 Job Date   Rsn  Job Code     Title            Grade FLSA EEO Func  EEO Grp St
 ---------- -  --------  ------------------- ----- ---- --- ----- --- ---- -
 02-02-1993 E  00414021                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
PDS00159 Command: ________________________________         02-19-1993 11:10
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                     Back  Fwd   Help        Aud
```


51846 7122

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

21. The location screen will be displayed.

```
ENTER LOCATION FOR NEW EMPLOYEE
  P D S                          EMPLOYEE MAINTENANCE                PDS01
==========================================================================
SSNO: 987654321   WOOD, HOLLY W                         Corp:     Stat: 10
==========================================================================
                                                                   Page: 1
  Loc Date Rsn Location         Dept Name              Hrs   EEO  Func  St
  ---------- - ---------- ------------------------- ------ ---- ------ -

  02-02-1993 E __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  PDS00156 Command: _____                                02-19-1993 11:15
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
  Edit  Exit        Zoom        Tran        Back  Fwd   Help       Aud
```

Enter Division Code

22. Enter the Division number in the LOCATION field and press [ENTER].

```
ENTER LOCATION FOR NEW EMPLOYEE
  P D S                          EMPLOYEE MAINTENANCE                PDS01
==========================================================================
SSNO: 987654321   WOOD, HOLLY W                         Corp:     Stat: 10
==========================================================================
                                                                   Page: 1
  Loc Date Rsn Location         Dept Name              Hrs   EEO  Func  St
  ---------- - ---------- ------------------------- ------ ---- ------ -

  02-02-1993 E 6122                                                    _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  __________ _ __________                                              _
  PDS00156 Command: _____                                02-19-1993 11:15
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
  Edit  Exit        Zoom        Tran        Back  Fwd   Help       Aud
```

51846 7123

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

23. The system will update the screen with your changes so that it will appear similar to the following. Press [ENTER].

```
NO ACCESS TO HIRE INTO THIS LOCATION
 P D S                          EMPLOYEE MAINTENANCE                      PDS01
---------------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                           Corp:     Stat: 10
---------------------------------------------------------------------------------
                                                                         Page: 1
 Loc Date Rsn Location         Dept Name                 Hrs    EEO  Func  St
 ---------- - ----------- ----------------------------- ------ ---- ------ -

 02-02-1993 E 00400006122 RJRT  EVANSVILLE IN    -SALES 40.00  0038 4616   _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 __________ _ ___________                                                  _
 PDS00156 Command: ___________________________________     02-19-1993 11:16
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom        Tran        Back  Fwd   Help       Aud
```

24. The shift screen will be displayed. Press [ENTER].

```
VALIDATE SHIFT FOR NEW EMPLOYEE
 P D S                          EMPLOYEE MAINTENANCE                      PDS01
---------------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                           Corp:     Stat: 10
---------------------------------------------------------------------------------
                                                                         Page: 1
 Shift Date Shift
 ---------- -
 02-02-1993 8











 PDS00156 Command: ___________________________________     02-19-1993 11:16
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom        Tran        Back  Fwd   Help       Aud
```


Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Update System with entries

25. The following screen will be displayed. Press [PF4] to update the system with your entries.

```
P D S              EMPLOYEE RETRIEVAL AND MAINTENANCE             PDS01
--------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                       Corp:      Stat: 10
--------------------------------------------------------------------------
                                                                  Page: 1
                              Basic: *
                           Location: *
                             Salary: *
                                Job: *
                              Shift: *
                             Status: *

PDS00156 Command: ____________________________________  02-19-1993 11:16
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom        Tran        Back  Fwd   Help        Aud
```

51845 7125

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

26. The following screen will be displayed.

```
P D S                          EMPLOYEE MAINTENANCE                    PDS01
----------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                     Corp: 4   Stat: 25
----------------------------------------------------------------------------

     Location: 02-02-1993   00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 02-02-1993   8

       Salary: 02-02-1993   20280       Pay Period: WKW Rate: 390.000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Comps: 100       Pct: 5.4

          Job: 02-02-1993   414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 02-02-1993   10          NEW-HIRE REGULAR
                                        Trans: 101
PDS001S5 Command: ____________________________________        02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

Verify Information

27. Verify the information on this screen. If it is correct, press [PF12] to go to the next employee.

51846 7126

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Processing Rehired Employees

Instructions on rehiring employees follow the new hire steps. Again, the selection must be complete when the PC begin administrative processing of the individual. The following section describes the PDS procedures necessary to add a rehire.

NOTE

When rehiring, if the employee was previously a temporary fill in or was part time and is being rehired as the same, use the same account number they previously had. If the rehire was a regular, full time employee and is being rehired as such, call Dot Draper for a new account number.

How To Use This Function

Adding a New Hire to PDS

1. Logon to PDS. In the selection line, type **PDS01** and enter the social security number as show in the example below. Press [ENTER].

```
P D S                        PDS INQUIRY/UPDATE                          PDS**
-------------------------------------------------------------------------------
     Func     Description                      Func      Description
     -----    ---------------------------      -----     ----------------------
   1 PDS01 EMPLOYEE MAINTENANCE
   2 PDS02 OPERATOR BALANCE AND RELEASE
   3 PDS03 PDS FUNCTIONAL SECURITY





PDS900M  Selection: PDS01 123456789_________________________  02-19-1993 14:17
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Sel   Exit        Zoom                                  Help
```

51846 7127

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. Details for this employee will be displayed. Press [PF10] to obtain the compensation screen.

```
P D S                          EMPLOYEE MAINTENANCE                          PDS01
-----------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                         Corp: 4   Stat: 25
-----------------------------------------------------------------------------------
First Name: HOLLY_____  Initials: W_  Last Name: WOOD_______________

            SSNO: 123456789__  Account: 123456789_____       08-18-1986

     Home Address: 80 WEST SIXTIETH STREET___________         11-20-1986
                   ____________________________

             City: LINCOLN______  State: NC Zip: 27104___

        Residence: USA_________       Province: ____________

       Home Phone: (919)777-1222

       Work Phone: __________

PDS001S3 Command: ________________________________________    02-19-1993 14:18
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10-PF11--PF12--
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

3. With the compensation screen displayed, bring the cursor down to STATUS and press [PF3] to zoom on the status screen.

```
P D S                          EMPLOYEE MAINTENANCE                          PDS01
-----------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                         Corp: 4   Stat: 25
-----------------------------------------------------------------------------------

      Location: 08-18-1986   00445000775 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-18-1986   8

        Salary: 01-05-1987   20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3     Incr: 20.000
                                         Compa: 100     Pct: 5.4

           Job: 08-18-1986   445237      TECHNICAL WRITER-TP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-22-1987   55          PERS FAMILY REASONS
                                         Trans: 326
PDS001S5 Command: ________________________________________    02-19-1993 14:20
Enter-PF1---PF2--PF3 -PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```


51846 7128

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The following screen will be displayed. Press [PF5] to rehire the employee.

```
P D S                        EMPLOYEE MAINTENANCE                       PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                    Corp: 4   Stat: 25
------------------------------------------------------------------------------
                                                                      Page: 1
Status Date   Trans   Status
----------    ---     --

05-22-1987    327     25      OTHER
08-18-1986    103     20
                                      Hire Date: 08-18-1986
__________    ___                  Service Date: 08-18-1986
__________    ___              Termination Date: 05-22-1987
__________    ___
__________    ___                      Last Day: 05-22-1987
__________    ___             Leave Expire Date: __________
__________    ___                    Erisa Date: __________
__________    ___
__________    ___
PDS001SA Command: ______________________________________  02-19-1993 14:21
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom        Rehire    Back  Fwd   Help        Aud
```

Address Information

5. You will be returned to the address screen. Make any changes to this information on this screen, as required and press [ENTER].

```
P D S                        EMPLOYEE MAINTENANCE                       PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                    Corp: 4   Stat: 25
------------------------------------------------------------------------------
First Name: HOLLY______  Initials: W_  Last Name: WOOD________________

                 SSNO: 123456789__  Account: 123456789______   08-18-1986

         Home Address: 80 WEST SIXTIETH STREET____________      11-20-1986
                       ______________________________

                 City: LINCOLN______  State: NC Zip: 27104____

            Residence: USA__________       Province: ____________

           Home Phone: (919)777-1222

           Work Phone: ___________

PDS001S3 Command: ______________________________________  02-19-1993 14:18
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

51846 7129

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Citizenship

6. The citizenship screen will be displayed. Change information as needed and press [ENTER].

```
ENTER INFORMATION
 P D S                          EMPLOYEE MAINTENANCE                          PDS01
------------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                              Corp:     Stat: 10
------------------------------------------------------------------------------------

             Credit Cards  Auto: N   Air: N Phone: N   Gas: N Am Ex: N

              Citizenship: USA_________ _____________

                Languages: __ __ __ __

              Work Permit: ______      Expires: ________
                     Visa: _______     Expires: ________
                 Passport: ______      Expires: ________

Expatriate: _ Imq: _ SIP: _ VSIP: _ Accident Ins: _ Sickness Ins: _ Death: _

Travel Allowance: ____________________________ Officer Code: __
     Company Car: ___

 PDS001SG Command: ____________________________________________ 02-19-1993 14:26
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit              Updt                  Back  Fwd   Help
```


51846 7130

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Emergency

7. The emergency contact screen will be displayed. Make necessary changes and press [ENTER].

```
ENTER INFORMATION
 P D S                        EMPLOYEE MAINTENANCE                       PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY                       Corp:      Stat: 10
------------------------------------------------------------------------------

              Birth Date: 11-11-1960
                     Race: W Sex: F Marital Status: M Vet: 0 Handicap: 0

              Spouse SSNO: _________  Birth Date:
                Last Name: _____________________  First Name: ______

        Emergency Contact: BURL WOOD__________  Relation: FATHER_
                  Address: ____________________
                    Phone: (919)777-1222

PDS001S4 Command: ______________________________________  02-19-1993 14:28
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read        Updt        Bal   Back  Fwd   Help  Comp  Aud   Empl
```

Education

8. The education screen will be displayed. Make necessary changes and press [ENTER].

```
ENTER INFORMATION
 P D S                        EMPLOYEE MAINTENANCE                       PDS01
------------------------------------------------------------------------------
SSNO: 123456789  WOOD, HOLLY W                      Corp:      Stat: 10
------------------------------------------------------------------------------
Education


Highest Education: 63   BACH SCIENCE                Year: 1984
           School: 1111 SEREN COL
          Subject: L19  EDUC

   Next Education: __                               Year: ____
           School: __
          Subject: __

 In Prog Education: 70   MASTER IN PROG              Year: ____
           School: 2222 UNIV OF GA
          Subject: L23  ENGLISH
                   Credits Required: __  Earned: __
PDS001SE Command: ______________________________________  02-19-1993 14:29
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Updt              Back  Fwd   Help
```

51846 7131

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Prior Employment

9. The prior employment screen will be displayed. Always change the source code to FE (Former Employee) and make any other necessary changes and press [ENTER].

```
ENTER INFORMATION
 P D S                    EMPLOYEE MAINTENANCE                     PDS01
-------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                  Corp:     Stat: 10
-------------------------------------------------------------------------
Prior Employment            Source: FE FORMER EMPLOYEE

                    Company          From    Thru        Duties
              -----------------     -----   -----   ------------------
              WACHOVIA SERVICES_    07-83   08-86   DOCUMENTATION SPCLST

 PDS001SD Command:                                      02-19-1993 14:30
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit            Updt                           Help
```


51846 7132

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Status

10. The status date and transaction code screen will be displayed. Change the current line date to the new effective date that the employee will begin work. Change the trans code to one of the following:

- 102 - Rehire Regular Full-Time
- 110 - Rehire Part Time
- 112 - Rehire Temp Fill In (Sales Rep Temp)

```
VERIFY HIRE
 P D S                        EMPLOYEE MAINTENANCE                        PDS01
===============================================================================
SSNO: 123456789   WOOD, HOLLY W                      Corp:      Stat: 10
===============================================================================
                                                                      Page: 1
 Status Date   Trans   Status
 -----------   ---     --

 02-19-1993    102     10      REHIRE REGULAR
 05-22-1987    327     25
 08-18-1986    103     20              Hire Date: 02-19-1993
                                    Service Date: 02-19-1993
                                Termination Date: 05-22-1987

                                        Last Day: 05-22-1987
                               Leave Expire Date: __________
                                      Erisa Date: __________

PDS0015A Command:                                              02-19-1993 14:33
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

51846 7133

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

11. After making your entries, press [ENTER]. The system will update the screen with your changes. Press [ENTER].

```
VERIFY LAST DAY WORKED CHANGE
 P D S                          EMPLOYEE MAINTENANCE                    PDS01
==============================================================================
SSNO: 123456789   WOOD, HOLLY W                   Corp: 4   Stat: 10
==============================================================================
                                                                      Page: 1
 Status Date   Trans  Status
 -----------   ---    --

 02-19-1992    102     10     REHIRE REGULAR
 05-22-1987    327     25
 08-18-1986    103     20             Hire Date: 02-19-1992
 __________    ___                 Service Date: 02-19-1992
 __________    ___             Termination Date: __________
 __________    ___
 __________    ___                     Last Day: __________
 __________    ___            Leave Expire Date: __________
 __________    ___                   Erisa Date: __________
 __________    ___
 __________    ___
 PDS001SA Command: ______________________________________  02-19-1993 14:46
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom        Rehire      Back  Fwd   Help        Aud
```

51846 7134

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Salary

12. The salary screen will be displayed. Enter the new biweekly rate in the RATE field and press [ENTER]. Enter one of the following pay codes in the PAY field:

- 1 - monthly
- 2 - Biweekly

Press [ENTER].

```
ENTER RATE
 P D S                     EMPLOYEE MAINTENANCE                      PDS01
-------------------------------------------------------------------------
SSNO: 123456789   wood, holly w                    Corp:     Stat: 10
-------------------------------------------------------------------------
                                                                Page: 1
 Sal Date   Rsn  Annual   Prd    Incr           Rate      Pct  Pay Compa
 ---------- -  --------- ---  ------------  -----------  ----- -   ---

 02-19-1993 E  _________ ___  ____________  ___ 950.00         2   ___


PDS001S8 Command:                                          02-19-1993 14:36
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

51846 7135

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

13. The job code screen will be displayed. Enter the job code using one of the following:

- Retail Rep 14021
- Executive Asst 14060
- Admin Asst - FS 20286
- Sec - Fld Sls 20091
- Gen Sec Fld Sls 20090
- Sales Rep - Temp 14057
- Part-Time Sec 14032
- PT Merch Coord 14002
- Prom Specialist 14007
- Gen Sls Worker 14006

Job Code

```
ENTER JOB
 P D S                        EMPLOYEE MAINTENANCE                       PDS01
==============================================================================
SSNO: 123456789   WOOD, HOLLY W                      Corp:     Stat: 10
==============================================================================
                                                                       Page: 1
 Job Date   Rsn Job Code       Title             Grade FLSA EEO Func  EEO Grp St
 ---------- -  --------  -------------------  ----- ---- --- ----- --- ---- -

 02-19-1993 E  00414021 RETAIL REP                                              _
 08-18-1986 N  00445237 TECHNICAL WRITER-TP   30 06   N    B  420   325 B30  1
 __________ _  ________                                                       _
 __________ _  ________                                                       _
 __________ _  ________                                                       _
 __________ _  ________                                                       _
 __________ _  ________                                                       _
 __________ _  ________                                                       _
 __________ _  ________                                                       _
 __________ _  ________                                                       _
PDS00159 Command:                                          02-19-1993 14:37
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

❖ *Note:* Be sure to enter the company code as 004 and the job code (e.g., 14007) as follows — 00414007.

51846 7136

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Location

14. Press [ENTER]. The location screen will be displayed. Enter the DIVISION number in the LOCATION field and press [ENTER].

```
ENTER LOCATION FOR NEW EMPLOYEE
 P D S                          EMPLOYEE MAINTENANCE                         PDS01
===============================================================================
SSNO: 987654321   WOOD, HOLLY W                              Corp:     Stat: 10
===============================================================================
                                                                        Page: 1
  Loc Date Rsn Location        Dept Name                  Hrs   EEO  Func  St
---------- - ----------  -------------------------------  ------ ---- ------ -
__________
02-02-1993 E 6122                                                            _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
__________ _ __________                                                      _
PDS00156 Command: ___________________________________________ 02-19-1993 11:15
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom        Tran        Back  Fwd   Help        Aud
```

15. The system will complete the location information. Press [ENTER].

51846 7137

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Shift

16. The shift screen will be displayed. Press [ENTER].

```
VALIDATE SHIFT FOR NEW EMPLOYEE
 P D S                         EMPLOYEE MAINTENANCE                    PDS01
=============================================================================
SSNO: 987654321   WOOD, HOLLY W                          Corp:     Stat: 10
=============================================================================
                                                                   Page: 1
 Shift Date Shift
 ---------- -
 02-02-1993  8

 PDS001S6 Command:                                          02-19-1993 11:16
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit       Zoom        Tran        Back  Fwd   Help        Aud
```

17. The following screen will be displayed. The asterisks (*) displayed beside each type indicate that changes were made to these categories.

```
 P D S             EMPLOYEE RETRIEVAL AND MAINTENANCE           PDS01
=============================================================================
SSNO: 987654321   WOOD, HOLLY W                          Corp:     Stat: 10
=============================================================================
                                                                   Page: 1
                             Basic: *
                          Location: *
                            Salary: *
                               Job: *
                             Shift: *
                            Status: *

PDS001S6 Command:                                           02-19-1993 11:16
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit       Zoom        Tran        Back  Fwd   Help        Aud
```

51846 7138

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

18. Press [PF4] to update the screen with this rehire. The Compensation screen will be displayed.

```
P D S                          EMPLOYEE MAINTENANCE                         PDS01
=================================================================================
SSNO: 123456789   WOOD, HOLLY W                          Corp: 4   Stat: 25
---------------------------------------------------------------------------------

     Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 08-02-1986   8

       Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Compa: 100       Pct: 5.4

          Job: 08-02-1986   414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 05-02-1987   10          NEW-HIRE REGULAR
                                        Trans: 101
PDS001S5 Command: ____________________________________________ 02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

19. Press [ENTER] to exit from this screen. You have successfully rehired the employee.

PAF and HRIS Maintenance

Division/Chain/Region management will periodically forward changes regarding employees within their operating units. Included could be changes in:

- Location
- Job
- Salary
- Status

When the PC receives notification of status change, they must logon to PDS.

51846 7139

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Making Status Changes

This function is used to make changes to employee's status including location, job, salary, shift and status fields.

How To Use This Function

1. Logon to PDS. In the selection line, type PDS01 and enter the social security number. Press [PF10] and the following screen will be displayed.

```
P D S                        EMPLOYEE MAINTENANCE                       PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                      Corp: 4   Stat: 25
------------------------------------------------------------------------------

     Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 08-02-1986   8

       Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390,000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Compa: 100       Pct: 5.4

          Job: 08-02-1986   414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 05-02-1987   10          NEW-HIRE REGULAR
                                        Trans: 101
PDS00155 Command: ____________________________________________ 02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

2. Move the cursor to the LOCATION field and press [PF3] to zoom on location history.

51846 7140

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Location

3. The following screen will be displayed.

```
ENTER LOCATION FOR NEW EMPLOYEE
 P D S                        EMPLOYEE MAINTENANCE                          PDS01
---------------------------------------------------------------------------------
 SSNO: 987654321   WOOD, HOLLY W                               Corp:    Stat: 10
---------------------------------------------------------------------------------
                                                                         Page: 1
  Loc Date Rsn Location          Dept Name                  Hrs   EEO  Func  St
 ---------- - ---------- ---------------------------------- ------ ---- ------ -

 07-03-1991 N 0040000424  RJRT TYPE TX DIVISION - SALES 40.00 0038 4614       _

 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 __________ _ __________                                                       _
 PDS00156 Command: ___________________________________           02-19-1993 11:15
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom        Tran        Back  Fwd   Help        Aud
```

4. Make the following entries on this screen:

- Enter the effective date of the location change in the LOC DATE field.
- Enter the location reason code in the RSN field. The only valid code is "X."
- Enter the new location (Division number) in the LOCATION field.

51846 7141

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Press [ENTER]. Press [PF1] to return to the Compensation screen.

```
P D S                         EMPLOYEE MAINTENANCE                        PDS01
********************************************************************************
SSNO: 123456789   WOOD, HOLLY W                     Corp: 4    Stat: 25
********************************************************************************

      Location: 08-02-1986*  00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3      Incr: 20.000
                                         Compa: 100      Pct: 5.4

           Job: 08-02-1986   414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-02-1987   10          NEW-HIRE REGULAR
                                         Trans: 101
PDS001S5 Command:                                              02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

6. Move the cursor to the SALARY field and press [PF3] to zoom on salary history.

7. The following screen will be displayed.

51846 7142

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Salary

```
ENTER RATE FOR NEW EMPLOYEE
 P D S                          EMPLOYEE MAINTENANCE                    PDS01
------------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                           Corp:     Stat: 10
------------------------------------------------------------------------------
                                                                      Page: 1
 Sal Date   Rsn  Annual   Prd      Incr            Rate      Pct  Pay Compa
 ----------  -  --------- ---  -------------  ------------  -----  -   ---

 12-34-1991  H   13520    BSB                 520,000        2        100
 07-03-1991  E   13520    WKW                 260,00         5        100




 PDS00158 Command: ________________________________________ 02-19-1993 11:08
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit       Zoom                      Back  Fwd   Help        Aud
```

8. Make the following entries on this screen:

   - Enter the effective date of the new salary change in the SAL DATE field.
   - Enter the salary reason code in the SAL field and press [ENTER]. Salary reason codes include:
     - O (alpha O not 0) - part time or temp fill-in
     - E - employee regular full time
   - Enter the new Biweekly Salary rate in the RATE field.
   - Enter the pay code in the PAY field.

9. Press [PF1] to return to the Compensation screen. Place the cursor on the JOB field and press [PF3] to zoom on the job history.

51846 7143

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
P D S                         EMPLOYEE MAINTENANCE                        PDS01
-------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                        Corp: 4   Stat: 25
-------------------------------------------------------------------------------

      Location: 08-02-1986*  00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987*  20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3      Incr: 20.000
                                         Compa: 100      Pct: 5.4

           Job: 08-02-1986   414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-02-1987   10          NEW-HIRE REGULAR
                                         Trans: 101
PDS001S5 Command: ________________________________________  02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

Job Code

10. The following screen will be displayed.

```
ENTER JOB FOR NEW EMPLOYEE
 P D S                        EMPLOYEE MAINTENANCE                        PDS01
-------------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                        Corp:      Stat: 10
-------------------------------------------------------------------------------
                                                                     Page: 1
 Job Date    Rsn  Job Code      Title          Grade FLSA EEO Func  EEO Grp St
 ----------   -   --------  ---------------- ----- ---- --- ----- --- ---- -

 02-02-1993   O   00414057                                                   _
 10-05-1991   O   00441007  PROMOTIONAL SPECIAL  39 04  N    D    418   315 D50 _
 __________   _   ________                                                   _
 __________   _   ________                                                   _
 __________   _   ________                                                   _
 __________   _   ________                                                   _
 __________   _   ________                                                   _
 __________   _   ________                                                   _
 __________   _   ________                                                   _
PDS001S9 Command: ________________________________________  02-19-1993 11:10
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

51846 7144

© R.J. Reynolds Tobacco Company 1993

11. Make the following entries on this screen:

    - Enter the effective date of the new job in the JOB DATE field.
    - Enter the job reason code in the RSN field. Valid codes include:
        - O (alpha O) - Regular full time
        - Q - Part time or temp fill in
    - Enter the new job number in the JOB CODE field. Remember to enter the company number plus the job number (e.g., 00414057).

12. Press [PF1] to return to the Compensation Screen.

```
P D S                          EMPLOYEE MAINTENANCE                          PDS01
----------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                       Corp: 4   Stat: 25
----------------------------------------------------------------------------------

    Location: 08-02-1986*  00400006122 RJRT R&D APPLIED R & D
                           Reason: N   Hours: 37.50

       Shift: 08-02-1986   8

      Salary: 01-02-1987*  20280       Pay Period: WKW Rate: 390.000
                           Reason: A   Payroll: 3      Incr: 20.000
                                       Compa: 100       Pct: 5.4

         Job: 08-02-1986*  414021      RETAIL REP
                           Reason: N   FLSA: N Grade: 3006

      Status: 05-02-1987   10          NEW-HIRE REGULAR
                                       Trans: 101
PDS001S5 Command: ________________________________________    02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

13. Move the cursor to the STATUS field and press [PF3] to zoom to the status history screen.

14. The following screen will be displayed.

51846 7145

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Status

```
VERIFY NEW HIRE
 P D S                          EMPLOYEE MAINTENANCE                        PDS01
---------------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                              Corp:      Stat: 10
---------------------------------------------------------------------------------
                                                                         Page: 1
 Status Date  Trans  Status
 ----------    ---     --

 02-19-1993    545
 07-03-1991    109     50     NEW-HIRE TEMP PART-TIME
 __________    ___
 __________    ___                      Hire Date: 02-19-1993
 __________    ___                   Service Date: 02-19-1993
 __________    ___               Termination Date: __________
 __________    ___
 __________    ___                       Last Day: __________
 __________    ___              Leave Expire Date: __________
 __________    ___                     Erisa Date: __________
 __________    ___
 __________    ___
 PDS001SA Command:                                               02-19-1993 11:04
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

15. Make the following entries on this screen:
    - Enter the effective date of the change in the STATUS DATE field.
    - Enter the transaction code in the TRANS field. Valid codes include:
        - 545 - Part time to temp fill in
        - 547 - Temp fill in to reg full time
        - 540 - Part time to reg full time
        - 551 - Temp fill in to part time
16. Press [PF1] to return the Compensation screen. Note that asterisks (*) are displayed by each category. Verify the accuracy and press [PF4] to update the system with your changes.

51846 7146

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
P D S                     EMPLOYEE MAINTENANCE                          PDS01
=============================================================================
SSNO: 123456789   WOOD, HOLLY W                    Corp: 4   Stat: 25
=============================================================================

     Location: 08-02-1986*  00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 08-02-1986   8

       Salary: 01-02-1987*  20280       Pay Period: WKW Rate: 390.000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Compa: 100       Pct: 5.4

          Job: 08-02-1986*  414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 05-02-1987*  10          NEW-HIRE REGULAR
                                        Trans: 101
PDS00155 Command: ________________________________________ 02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

17. You have successfully changed the status of the employee.

51846 7147

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Terminations

Unfortunately, terminations are an unpleasant fact of life. However, it is critical that terminations are handled expeditiously to ensure the accuracy of records. Because of the legal ramifications and sensitive nature of these acts, the PC has no involvement in the completion of Termination Papers. This activity is undertaken by the Manager in charge of the work unit. When the PC receives a termination report, the PDS system must be accessed to accurately update information relative to the termination. All regular full-time and Sales Rep temps should call in to Dot Draper immediately - ext - 2339, after the solvency check is complete.

When employees are terminated, you must update the PDS system with this information. Following are procedures for accomplishing this.

How To Use This Function

1. Logon to PDS. In the selection line, type **PDS01** and enter the social security number. Press [PF8] to page forward until the following screen is displayed.

```
P D S                          EMPLOYEE MAINTENANCE                        PDS01
--------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                     Corp: 4   Stat: 25
--------------------------------------------------------------------------------

     Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 08-02-1986   8

       Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Compa: 100       Pct: 5.4

          Job: 08-02-1986   414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 05-02-1987   10          NEW-HIRE REGULAR
                                        Trans: 101
PDS001S5 Command: ____________________________________________ 02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

2. Place the cursor on the STATUS field and press [PF3] to zoom on the status history.

51846 7148

Status

3. The following screen will be displayed.

```
VERIFY NEW HIRE
 P D S                      EMPLOYEE MAINTENANCE                    PDS01
==========================================================================
SSNO: 987654321   WOOD, HOLLY W                        Corp:    Stat: 10
==========================================================================
                                                                 Page: 1
 Status Date   Trans   Status
 ----------    ---     --

 02-19-1993    313     55
 07-03-1991    109     50     NEW-HIRE TEMP PART-TIME
 __________    ___
 __________    ___                    Hire Date: 02-19-1993
 __________    ___                 Service Date: 02-19-1993
 __________    ___             Termination Date: __________
 __________    ___
 __________    ___                     Last Day: __________
 __________    ___            Leave Expire Date: __________
 __________    ___                   Erisa Date: __________
 __________    ___
 __________    ___

PDS0015A Command: ______________________________________ 02-19-1993 11:04
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

4. Make the following entries on this screen:

- Enter the effective date of the termination in the STATUS DATE field.
- Enter the transaction code in the TRANS code field using one of the following codes:
  - 313 - Self-employment
  - 314 - Voluntarily quit
  - 315 - Family illness
  - 318 - Failed to report for work
  - 320 - Ret to school
  - 321 - Relocation
  - 322 - Health reasons
  - 325 - Transportation problems
  - 326 - Personal family reasons
  - 327 - Other
  - 328 - Disability
  - 338 - Accept other employ
  - 340 - Dissat work
  - 341 - Dissat opport
  - 342 - Dissat compen
  - 343 - Dissat hours
  - 344 - Dissat suprv
  - 345 - Dissat fel emp

51846 7149

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- 346 - Dissat comp pol
- 348 - Dissat loc
- 351 - Unsat perform
- 352 - Misstate appl
- 353 - Rule violation
- 354 - Insubordination
- 357 - Dishonesty
- 358 - Misconduct
- 359 - Attendance
- 360 - Punctuality
- 361 - Attend/Punct
- 364 - Reduce force
- 366 - Other invol term
- 367 - Invol health reasons
- 371 - Did not report for assignment
- 400 - Normal retire
- 401 - Early retire
- 402 - Disability retirement
- 420 - Death - active
- 421 - Death - inactive

• Enter the last day worked in the LAST DAY field.

5. Press [ENTER] twice. Press [PF1] to return to the Compensation screen.

```
P D S                          EMPLOYEE MAINTENANCE                            PDS01
-------------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                          Corp: 4   Stat: 25
-------------------------------------------------------------------------------------

      Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3      Incr: 20.000
                                         Compa: 100       Pct: 5.4

           Job; 08-02-1986   414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 02-19-1993   55          SELF-EMPLOYMENT
                                         Trans: 313
PDS00155 Command: ________________________________________        02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

6. An asterisk (*) will be displayed beside the STATUS line indicating that a change has been made. Press [PF4] to update the system with this termination.

51846 7150

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. After you have completed the system input, put the original termination report (form 339) in the Personnel folder and send it overnight to Dot Draper in Sales Personnel.

Location Change Only

When employees change to another location, the PC must change the PDS system to reflect this change.

When employees change to another location, you must change the PDS system to reflect this change.

How To Use This Function

1. Logon to PDS. In the selection line, type **PDS01** and enter the social security number. Press [PF8] to page forward until the following screen is displayed.

```
P D S                        EMPLOYEE MAINTENANCE                        PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                     Corp: 4   Stat: 25
------------------------------------------------------------------------------

      Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3      Incr: 20.000
                                         Compa: 100       Pct: 5.4

           Job: 08-02-1986   414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-02-1987   10          NEW-HIRE REGULAR
                                         Trans: 101
PDS00155 Command:                                            02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

2. Place the cursor in the LOCATION field and press [PF3] to zoom on the location history for this screen.

51846 7151

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Location

3. The following screen will be displayed.

```
ENTER LOCATION FOR NEW EMPLOYEE
  P D S                          EMPLOYEE MAINTENANCE                    PDS01
------------------------------------------------------------------------------
 SSNO: 987654321   WOOD, HOLLY W                          Corp:      Stat: 10
------------------------------------------------------------------------------
                                                                       Page: 1
  Loc Date Rsn Location          Dept Name                 Hrs   EEO  Func  St
  ---------- - ----------- ----------------------------- ------ ---- ------ -

  07-03-1991 N 00400004424  RJRT TYPE TX DIVISION - SALES 40.00 0038 4614   _

  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
  __________ _ ___________                                                  _
 PDS00156 Command:                                            02-19-1993 11:15
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom        Tran        Back  Fwd   Help        Aud
```

4. Make the following entries:

- Enter the date of change in the LOC DATE field.
- Enter the reason code in the RSN code field. Valid codes include:
    - X - Different Job - Department reassignment due to assignment to different job where the new job is located in a different department
    - Z - Same Job - Department reassignment but employee retains prior job classification

51846 7152

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Press [PF1] to return to the Compensation screen. An asterisk (*) will be displayed beside LOCATION. Press [PF4] to update the screen with your changes.

```
P D S                        EMPLOYEE MAINTENANCE                       PDS01
=============================================================================
SSNO: 123456789   WOOD, HOLLY W                     Corp: 4   Stat: 25
=============================================================================

      Location: 08-02-1986*  00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3      Incr: 20.000
                                         Compa: 100      Pct: 5.4

           Job: 08-02-1986   414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-02-1987   10          NEW-HIRE REGULAR
                                         Trans: 101
PDS00155 Command: ________________________________________ 02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

Salary Change Only

When an employee receives a salary change, you must change the information in PDS to reflect the change.

51846 7153

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

How To Use This Function

1. Logon to PDS. In the selection line, type **PDS01** and enter the social security number. Press [PF8] to page forward until the following screen is displayed.

```
P D S                    EMPLOYEE MAINTENANCE                         PDS01
----------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                   Corp: 4   Stat: 25
----------------------------------------------------------------------------

     Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 08-02-1986   8

       Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Compa: 100       Pct: 5.4

          Job: 08-02-1986   414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 05-02-1987   10          NEW-HIRE REGULAR
                                        Trans: 101
PDS00155 Command: ______________________________________ 02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```


51846 7154

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Salary

2. Place the cursor on the SALARY field and press [PF3] to zoom on the salary history field.

3. The following screen will be displayed.

```
ENTER RATE FOR NEW EMPLOYEE
  P D S                          EMPLOYEE MAINTENANCE                        PDS01
 ------------------------------------------------------------------------------
 SSNO: 987654321   WOOD, HOLLY W                            Corp:      Stat: 10
 ------------------------------------------------------------------------------
                                                                        Page: 1
  Sal Date    Rsn  Annual    Prd      Incr            Rate       Pct  Pay Compa
  ----------   -  --------- --- ------------- ------------- ----- -   ---

 ' 12-34-1991  H   13520     BSB                   520.000     2         100
  07-03-1991   E   13520     WKW                   260.00      5         100




  PDS00158 Command: ______________________________________________  02-19-1993 11:08
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
  Edit  Exit        Zoom                    Back  Fwd   Help        Aud
```

4. Make entries in the following fields:

   - Enter the effective date of change in the SAL DATE field. The date must be at the beginning of a pay period.
   - Enter the reason code for the salary change in the RSN field. The valid code is
     - 0 - Temporary - Increase given to temporary employee when adjusting salary rate.
   - Enter the increase amount in the INCR field.
   - Enter the new salary rate in the RATE field.
   - Enter the payroll number in the PAY field. The only valid code is 2 Bi-weekly.

51846 7155

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Press [ENTER]. Press [PF1] to return to the Compensation screen.

```
P D S                          EMPLOYEE MAINTENANCE                      PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                       Corp: 4   Stat: 25
------------------------------------------------------------------------------

      Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987*  20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3      Incr: 20.000
                                         Compa: 100       Pct: 5.4

           Job: 08-02-1986   414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-02-1987   10          NEW-HIRE REGULAR
                                         Trans: 101
PDS001S5 Command:                                            02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

6. An asterisk (*) will be displayed beside SALARY. Press [PF4] to update the system with your changes.

Job Change Only

When an employee receives a job change, the PC must change the information in PDS to reflect the change. A job change is considered a change in job title and position accountabilities.

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

How To Use This Function

1. Logon to PDS. In the selection line, type **PDS01** and enter the social security number. Press [PF8] to page forward until the following screen is displayed.

```
P D S                          EMPLOYEE MAINTENANCE                          PDS01
----------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                         Corp: 4   Stat: 25
----------------------------------------------------------------------------------

     Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                            Reason: N   Hours: 37.50

        Shift: 08-02-1986   8

       Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                            Reason: A   Payroll: 3      Incr: 20.000
                                        Compa: 100       Pct: 5.4

          Job: 08-02-1986   414021      RETAIL REP
                            Reason: N   FLSA: N Grade: 3006

       Status: 05-02-1987   10          NEW-HIRE REGULAR
                                        Trans: 101
PDS00155 Command: _______________________________________         02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

2. Place the cursor on JOB and press [PF3] to zoom on the job history for this employee.

51846 7157

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Job

3. The following screen will be displayed.

```
ENTER JOB FOR NEW EMPLOYEE
 P D S                      EMPLOYEE MAINTENANCE                        PDS01
-----------------------------------------------------------------------------
SSNO: 987654321   WOOD, HOLLY W                              Corp:   Stat: 10
-----------------------------------------------------------------------------
                                                                     Page: 1
 Job Date   Rsn Job Code       Title          Grade FLSA EEO Func  EEO Grp St
 ---------- -  -------- -------------------- ----- ---- --- ----- --- ---- -

 02-02-1993 0  00414057                                                     _
 10-05-1991 O  00441007 PROMOTIONAL SPECIAL  39 04  N    D   418   315 DSO  _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 __________ _  ________                                                     _
 PDS00159 Command: ________                                 02-19-1993 11:10
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit        Zoom                       Back  Fwd   Help      Aud
```

4. Make the following entries on this screen:

- Enter the date of the job change in the JOB DATE field.
- Enter the reason code in the RSN field. Valid codes include:
  - L - Lateral
  - O - Other
  - Q - Administration (most frequently used)
  - X - Rehire
- Enter the job code in the JOB CODE field.

51846 7158

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Press [ENTER]. Press [PF1] to return to the compensation screen.

```
P D S                           EMPLOYEE MAINTENANCE                          PDS01
===================================================================================
SSNO: 123456789   WOOD, HOLLY W                         Corp: 4   Stat: 25
===================================================================================

      Location: 08-02-1986   00400006122 RJRT R&D APPLIED R & D
                             Reason: N   Hours: 37.50

         Shift: 08-02-1986   8

        Salary: 01-02-1987   20280       Pay Period: WKW Rate: 390.000
                             Reason: A   Payroll: 3     Incr: 20,000
                                         Compa: 100      Pct: 5.4

           Job: 08-02-1986*  414021      RETAIL REP
                             Reason: N   FLSA: N Grade: 3006

        Status: 05-02-1987   10          NEW-HIRE REGULAR
                                         Trans: 101
PDS001S5 Command: ____________________________________________  02-19-1993 14:20
Enter-PF1---PF2---PF3*--PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt        Bal   Back  Fwd   Help  Per   Aud   Empl
```

6. An asterisk (*) will be displayed beside JOB. Press [PF4] to update the system with your changes.

Making Other Changes

The following procedures describe how to make other changes on this screen including name, address, veteran, and marital status changes. Note that you cannot change an employee's name without obtaining a copy of the changed name on the social security card.

How To Use This Function

1. Logon to PDS. In the selection line, type **PDS01** and enter the social security number. The following screen will be displayed.

51846 7159

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
P D S                          EMPLOYEE MAINTENANCE                        PDS01
--------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                      Corp: 4   Stat: 25
--------------------------------------------------------------------------------
First Name: HOLLY_____  Initials: W_  Last Name: WOOD_______________

              SSNO: 123456789__  Account: 123456789_____      08-18-1986

          Home Address: 80 WEST SIXTIETH STREET___________    11-20-1986
                        _________________________________

              City: LINCOLN______   State: NC Zip: 27104___

          Residence: USA_________       Province: _____________

          Home Phone: (919)777-1222

          Work Phone: ___________

PDS00153 Command: _______________________________________  02-19-1993 14:18
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

2. To change an employee's name, make sure that you have a copy of the social security number with the change.[TAB] to the NAME field and key over with you changes.

3. [TAB] to the portion of the address requiring changes and key over the existing information to make your changes. When you have completed edits to the employee name and address, press [PF4] to update the record with your changes. Remember, if you do not press [UPDT] your changes will not be saved. Refer to Address Do's and Don'ts in the appendix for information on making correct address entries.

51846 7160

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Emergency

4. You may also make changes to emergency contact information. Press [PF8] to page forward to the next page. You may change the marital status field only if you have verification — divorce decree (D), death certificate (W), marriage certificate (M), legal separation papers (L). You may change the veteran code status only if you have verification — a copy of the DD214 form..

```
ENTER INFORMATION
  P D S                        EMPLOYEE MAINTENANCE                        PDS01
--------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY                          Corp:     Stat: 10
--------------------------------------------------------------------------------

            Birth Date: 11-11-1960

                  Race: W Sex: F Marital Status: M Vet: 0 Handicap: 0

           Spouse SSNO: __________ Birth Date:
             Last Name: ___________________________ First Name: _______

     Emergency Contact: BURL WOOD____________ Relation: FATHER_
               Address: ___________________________
                 Phone: (919)777-1222

 PDS001S4 Command: _________________________________________ 02-19-1993 14:28
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
 Edit  Exit  Read        Updt        Bal   Back  Fwd   Help  Comp  Aud   Empl
```

5. Press [PF4] to update the system with your changes.

6. Once the changes have been made, copies of any documents used for verifications should be forwarded to Dot Draper in Sales Personnel.

51846 7161

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Entering Addresses — Do's and Don'ts

1. Never enter periods in the address. For example, Post Office should be abbreviated as PO not P.O.

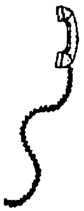
2. Never enter commas in the address. For example, Winston-Salem, NC is incorrect because of the comma.

3. If the employee has both a street address and a post office box, always use the Post Office Box as the address — not the street address. Never combine addresses (e.g., street and PO Boxes).

4. If the employee lives in an apartment, always list the apartment number below the street address. If there is a building or unit number associated with this address, list it before the apartment number.

5. If the employee has a route number associated with his address, always put the route number before the box number.

6. Do not put punctuation in the phone number field. The system will do it for you. For example (919) 631-4560 is an incorrect entry. The correct entry would be 9196314560.



Emergency Contact — Do's and Dont's

1. Enter the complete name (first, middle initial and last name) of the person to be contacted.

2. Do not use title such as Mr., Mrs., or Miss.

3. Enter the relationship of the contact person to the employee, using the following codes. Note that these are the only allowable codes:

AUNT	HUSBAND
BROTHER	M-IN-LAW
B-IN-LAW	MOTHER
COUSIN	NEPHEW
DAUGHTER	NIECE
F-IN-LAW	NO RELN
FATHER	S-IN-LAW
G-DAUGHTER	SISTER
G-FATHER	SON
G-MOTHER	UNCLE
G-SON	WIFE
GUARDN	

51846 7162

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Balancing Transactions and Recording Updates

The activities noted in the previous pages must be undertaken to update personnel records in PDS. However, none of these transactions will be officially recorded until the number of records updated is "balanced."

It is recommended the PC balance the transactions at the close the business each day. If the PC attempts to log off the system and PDS transactions have not been balanced, a warning will appear informing the PC that all PDS updates have not yet been balanced.

Balancing Transactions:

1. Once you have completed your changes, you must balance the records by pressing [PF6]. Press [ENTER]. The following screen will be displayed.

```
P D S                  OPERATOR BALANCE AND RELEASE                      PDS02
------------------------------------------------------------------------------
     For Cutoff: 10-15-1992  15:10               WSASD GARTH VADER
                  Transaction        Count              Amount
                 ------------        -----       -------------
     BALANCE     NEW HIRES           _____       _____________
                 RE-HIRES            _____       _____________
                 TO LOA              _____
                 FROM LOA            _____
                 TO LFF              _____
                 FROM LFF            _____
                 STATUS              _____       _____________
                 TERM                _____
                 OTHER               ____6

                 SALARY              _____       _____________

                 DEPT                _____
                 JOB                 _____
                 LUMP SUM            _____       _____________
PDS003U                                                       10-15-1992 15:12
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Force       Updt        Emp                             Aud
```

2. Add new hires, rehires, status, termination and salary changes to the count and amount fields on the appropriate line.
3. Verify that the numbers displayed equal the number of changes you have made to this point today. Press [PF4] to update the record.
4. Press [PF6] to return to the Employee Maintenance screen.

Requesting PAFs

From time to time, management may request printed copies of employee information for persons within their operating units. Also the PC will need to make changes to other personnel data not indicated in previous pages. In both instances, the PC will need to access an on-line system which displays current information relative to each employee.

51846 7163

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

1. When you need to make changes to other personnel data, you may request this information by pressing [PROF] from the Maintenance screen.

2. The following screen will be displayed.

```
P D S                      EMPLOYEE MAINTENANCE                          PDS01
------------------------------------------------------------------------------
SSNO: 123456789   WOOD, HOLLY W                      Corp: 4   Stat: 25
------------------------------------------------------------------------------
First Name: HOLLY_____ Initials: W_ Last Name: WOOD________________

              SSNO: 123456789__ Account: 816275______    08-18-1986

        Home Add                                          1986
                  Mark what you want and press <ENTER>
                  _ Online Personnel Action Form          04____
                  _ Batch Personnel Profile
          Resid   _                                       ____

        Home Phone: (919)725-8357

        Work Phone: ____________

PDS001S3 Command: ___________________________________  02-25-1993 07:50
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit  Read  Zoom  Updt  Prof  Bal         Fwd   Help  Comp  Aud   Empl
```

3. Mark an "X" beside Online Personnel Action Form and press [ENTER]. Note that you cannot choose the batch option.

51846 7164

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The following screen will be displayed.

```
---------------------------------------------------------------------------
Acct: 123456       SSNO: 123456789  WOOD, HOLLY         Corp/Pay 4   3
---------------------------------------------------------------------------
I.  Salary, Job, and Department Changes

Job: 445237    SALES REP  Loc: 00445000775 RJRT FIELD SALES

-------------------------- Recommended Increase ---------------------------
                     Rsn        Amount        New Rate   Pay Freq    Incr %
Eff Date: ________   __    ____________   ___________    _____     ______
New Job : ________   __  Title:______________________________
New Dept: ________   __  Name :______________________________

----------------------------- Salary History ------------------------------
           Date       Rsn        Amount        Rate                  Incr %
         01-05-1987   A           20.000      390.000                  5.4
         08-18-1986   E                       370.000


_____________________ __________________________ _________________________
 Approval 1       Date  Approval 2          Date  Approval 3          Date
 PDS001SP                                                 10-15-1992 15:15
```

5. Press [ENTER] to obtain additional PAF screens. Print the screens for which information needs to be revised or copied for management.

- To make changes, pencil in the details and send to Dot Draper in Sales Personnel for entry
- To communicate current status to management, copy screens and send to appropriate manager

✣ *Note:* When personnel are promoted, Management will often request a current PAF and make all necessary changes relative to salary, job title, etc., directly on printed copy. This copy will then be forwarded to Dot Draper in Sales Personnel for entry.

51846 7165

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Entering Sales Bonus Information

◆ *Note:* The procedures that follow discuss how to use the system but do not address company policy. You should be familiar with the SIAP Administrative Guideline Handbook before making entries in the system.

Entering Ratings for an Employee

Entering Ratings

1. Logon to PDS. In the selection line, enter SIAP and the employee's social security number or name. The Sales Bonus Employee Maintenance screen will be displayed.

```
P D S                        EMPLOYEE MAINTENANCE                      PDS01
-----------------------------------------------------------------------------
        SSNO: 123-45-6789  WOOD, HOLLY W                   Corp: 4   Stat: 10
     Plan Aff: TOB Year: 1992 How Added: J Job Code:    14075 Loc: 00400001122
Prorated Annual Rate: 34424      _______                 Days Out: ___
          Target %: 15.00        _____
      Sales Representative            Weight          Rating           Score
     -------------------------    -------------   -------------       -----
     COMPANY FINANCIAL ACF           7.00 _____    100.00 _____         7.00
     COMPANY FINANCIAL BUC          23.00 _____    100.00 _____        23.00
     SHARE OF MARKET FULL PRIC      20.00 _____    100.00 _____        20.00
     SHARE OF MARKET SAVINGS        10.00 _____    100.00 _____        10.00
     MBO'S                          40.00 _____    100.00 _____        40.00


        Award: 5164         <<<<<<<<<<<<< PROJECTED >>>>>>>>>>>     100.00
 Actual Award: _______
SBP002U  Command: _________________________________        10-15-1992 15:35
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom  Updt                          Help  Notes Aud   Emp
```

2. This screen displays information about the employee and the plan year. Enter the SHARE OF MARKET FULL PRICE, SHARE OF MARKET SAVINGS and MBO ratings to calculate the employee's actual award.

Viewing Salary Details

3. If you wish to view more details about the employee's salary, place the cursor on the PRORATED ANNUAL RATE field and press [PF3]. A window will display additional information about the job and salary.

Viewing Historical Record

51846 7166

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. If you would like to view the historical record about an employee, place the cursor on the YEAR field and press [PF3]. A window will display the records available. Place the cursor on the line you wish to view and press [ENTER] to view the record.

```
SBP History - Place cursor on line and press ENTER to select
        -- Plan --    Annual      Target
        Aff    Year    Gross      Percent  Score      Award
        ---    ----  ---------    -----    -----    ---------
      _ TOB    1992
      _ TOB    1991       3291      12.0    26.4         1106
```

Adding or Viewing Comments

5. To add or review free-form comments associated with this record, press [PF10]. A screen will display a place for entering comments. When you have completed your comments, press [UPDT] to save them and return to the previous screen.

Free-form comments field

```
P D S                         EMPLOYEE MAINTENANCE                         PDS01
--------------------------------------------------------------------------------
           SSNO: 123456789   WOOD, HOLLY                    Corp: 4    Stat: 10
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

SBP002S3                                                        10-15-1992 15:47
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit              Updt                                   Back
```

51846 7167

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Viewing Audit of those who have maintained this record

6. To view a record of those who have made edits to this record, press [PF11]. An audit window will be displayed.

```
                 Added: 03-20-1992 11:20:41.7 GSBP100P
               Updated: 08-03-1992 12:27:44.9 XXXXXXXX
     Proj Gross Updated:
 Target Percent Updated:
     Categories Updated:
        Weights Updated:
         Scores Updated:
         Pay Calculated:
         Pay Overridden:
                   Paid:
```


51846 7168

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. When you are ready to make an entry to the ratings on the record, [TAB] to the fields and make your entries complying with company policy. The system will calculate the projected award for you. You may make adjustments to the award or salary based on company policy by keying over existing entries. Press [ENTER] to view the results.

- *Note:* The company financial portions of the calculation will be entered by the home office. You only need to enter the SHARE OF MARKET FULL PRICE and SAVINGS and MBO ratings.

```
P D S                          EMPLOYEE MAINTENANCE                         PDS01
---------------------------------------------------------------------------------
          SSNO: 123456789 WOOD, HOLLY W                      Corp: 4   Stat: 10
      Plan Aff: TOB Year: 1992 How Added: J Job Code:      14326 Loc: 00400001122
Prorated Annual Rate: 40092          ____34067               Days Out: _55
           Target %: 15.00
     DISTRICT MANAGER(DM'S&ELM'S)      Weight              Rating          Score
     -------------------------       -------------      -------------      -----
     COMPANY FINANCIAL ACF              7.00 ______     100.00 100.00       7.00
     COMPANY FINANCIAL BUC             23.00 ______     100.00 100.00      23.00
     SHARE OF MARKET FULL PRIC         20.00 ______     100.00 ______      20.00
     SHARE OF MARKET SAVINGS           10.00 ______     100.00 ______      10.00
     MBO'S                             40.00 ______     100.00 ______      30.00


        Award: 4599        <<<<<<<<<<<< CALCULATED >>>>>>>>>>>>     90.00
 Actual Award: 1533_____
SBP002U  Command: ____________________________________________   10-16-1992 11:20
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom  Updt                              Help  Notes Aud   Emp
```

Updating Entry

8. When you have finished your entries, press [UPDT] to update the record with your changes.

9. To access another account, enter SIAP in the SELECTION field and the social security number or employee name and press [ENTER]. To return to the employee address screen, press [PF12].

51846 7169

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Prorating an Employee Account

1. You may need to prorate an employee account if, for example, the employee has missed a consecutive number of days beyond the time allowed by company policy. To adjust for this occurrence, access the employee record, enter the number of days the employee was out in the DAYS OUT field and press [ENTER]. The system will perform the calculations and prorate the account.

```
RECORD HAS BEEN UPDATED
 P D S                         EMPLOYEE MAINTENANCE                    PDS01
----------------------------------------------------------------------------
         SSNO: 123456789  WOOD, HOLLY                      Corp: 4   Stat: 10
      Plan Aff: TOB Year: 1992 How Added: J Job Code:    14075 Loc: 0040000I122
Prorated Annual Rate: 34424     ____29251            Days Out: 55
           Target %: 15.00      ______
     Sales Representative            Weight         Rating          Score
     ------------------------     ------------   ------------       -----
     COMPANY FINANCIAL ACF           7.00 _____   100.00 _____        7.00
     COMPANY FINANCIAL BUC          23.00 _____   100.00 _____       23.00
     SHARE OF MARKET FULL PRIC      20.00 _____   100.00 _____       20.00
     SHARE OF MARKET SAVINGS        10.00 _____   100.00 _____       10.00
     MBO'S                          40.00 _____   100.00 _____       40.00


        Award: 4388         <<<<<<<<<<<<<< PROJECTED >>>>>>>>>>>>    100.00
 Actual Award: _________
SBP002U  Command: _____________________________________________ 10-15-1992 15:55
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom  Updt                          Help  Notes Aud   Emp
```

2. Press [UPDT] to update the account with this entry. You may also make manual adjustments to prorate the employee's account by entering the prorated salary amount in the PRORATED ANNUAL RATE field.

3. You may also prorate the employee award based on performance by adjusting the figure entered in the RATING field for the MBO. If you enter less than 100%, for those who are classified as underachievers based on company policy, the system will automatically adjust the score and award amount. If the employee is an overachiever, you can enter a figure greater than 100% and the system will automatically adjust the score and award amount.

51846 7170

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Employee Job Change

1. If an employee has changed jobs during the year, a screen listing the jobs the employee has held during the year will be displayed. It is important that you remember to make entries for ALL jobs.

```
P D S                        EMPLOYEE MAINTENANCE                      PDS01
-----------------------------------------------------------------------------
       SSNO: 501845658   LIMING, DWIGHT J                  Corp: 4   Stat: 10
    Plan Aff: TOB Year: 1992 How Added: J

                                             Prorated
    Category                                Annual Rate    Target %
    -------------------------               -----------    --------
     DISTRICT MANAGER(DM'S&EL                      9629       15.00
     Sales Representative                         19023       15.00

SBP002U                                                    10-15-1992 15:58
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
Edit  Exit        Zoom                                                 Emp
```

2. Place the cursor on the first job and press [PF3] to access the details. Make entries to this record in compliance with company policy. When entries are completed, press [UPDT] to update the record.

3. Press [PF2] to return to the screen listing all the jobs and select the next job. Press [PF3] to access the details associated with this job and make your entries.

4. Continue this procedure for all jobs held by the employee throughout the year

51846 7171

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7172

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

FIELD SALES OPERATING FUNDS

Summary

The Personnl & Administration Coordinator is responsible for the maintenance of Field Sales Operating Funds (FSOF) and other financial issues related to the Personnel Department. These other issues include jobber agreements, handling of vehicle break-ins and uncollected call-throughs, and assistance with processing of Cigarette Excise Tax increases.

Field Sales Operating Funds are provided to Field Sales employees and are to be used ONLY to purchase inventory stock for for appropriate, lawful travel and living expenses incurred while on Company business (e.g., gasoline, lodging etc.). Fund amounts are determined by Division and Region Management and are based on the requirements of the employee's assignment.

Approved FSOF authorization limits are as follows:

Management	*Approval Required**
Division	Up to $5,000
Region	Up to $10,00

**Based on TOTAL fund balance assigned to employee*

While Field Sales management retains the financial accountability of auditing FSOF for all employees under their direct supervision, the Operations Unit and its Personnel & Administration Coordinator are responsible for administration and forwarding of properly approved documents to Sales Finance.

The following procedures must be adhered to when obtaining, assigning, and controlling Field Sales Operating Funds.

New Funds/Increase to Current Funds

When FSOF are required for new employees or an increase to an employee's current fund balance is necessary, the Increase Request and Receipt Form #6217 should be submitted through appropriate levels of management.

Proper paperwork may be prepared by the PC at the request of appropriate management. Regardless of who prepares Form #6217, completed forms will be submitted to the Operations Unit for review and submission to Sales Finance.

A master copy of Form #6217 follows. Instructions for completing the form are on the reverse side.

51846 7173

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 7174

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
R.J. Reynolds Tobacco Company
RJRT Form 6217 - Rev 2/91

FIELD SALES OPERATING FUND
Increase Request and Receipt

Issue Check To:

Employee Name ______________________ Account Number ______________

Amount Requested $ ______________________ Division Number ______________
(AMOUNT OF CHECK ISSUED)

Beginning Fund Balance $ ______________

Fund Increase $ ______________

Ending Fund Balance $ ______________

I understand that this Field Sales Operating Fund is to be used by me to purchase merchandise (manufactured by R.J. Reynolds Tobacco Company) from distributors at the prevailing wholesale price, and for expenses in conducting other Company business. I further understand that I will be accountable for this Field Sales Operating Fund. Upon termination of my employment with the Company, or whenever otherwise requested by the Company, I agree to repay the above *ending fund balance*. ***ENDORSEMENT OF THIS CHECK CONSTITUTES RECEIPT OF THE FUNDS.***

Employee Signature ______________________________ Date ______________

APPROVAL REQUIRED

	NAME	TITLE/DIVISION	SIGNATURE	DATE
Initiated By:				
Approved By:				
Approved By:				
Approved By:				

Reason for Increase (Must Be Completed): ______________________________

51846 7175

Original: Sales Finance, Winston-Salem

NOTE: Incomplete forms will be returned to the initiator for completion prior to the issuance of funds.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

INSTRUCTIONS

Field Sales Operating Fund Increase Request

This form is used to establish an Operating Fund or increase an existing Operating Fund. This form must be completed and approved prior to the issuance of funds. Endorsement of the FSOF check constitutes receipt of the funds. (RJRT Form 3313 receipt no longer required.) The employee must make a copy of this form for their records.

Division, Region, or Area Management completes the form, including employee data, beginning fund balance, fund increase, ending fund balance, and the reason the increase is being requested. Please note that any transactions sent to Sales Finance since the last listing must be taken into consideration when indicating the beginning fund balance. Employee's current fund balances can also be obtained by consulting the employee inquiry screen in SES.

The employee reviews the data/balances and signs the form.

The form is then submitted to the proper authority level for approval. In some cases, this may be the same person as the initiator.

Copies are made to be retained by Field Sales Management and the employee.

The original completed form is mailed to Sales Finance, Winston-Salem. Forms sent to any other location will result in a delay in processing.

Mail Services will mail the check to the Division, Region, or Area Management to whom the employee reports.

51846 7176

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

FIELD SALES OPERATING FUNDS

Transfer of Funds

This function applies when an employee's funds are collected by Sales Management due to a termination, promotion, transfer, or resignation. The fund is retained by Management, who in turn will reissue it to the new replacement (if not refunded to the Company) or enable a transfer between employees WITHIN THE SAME DIVISION. A Transfer Request and Receipt Form #6217A should be submitted through appropriate levels of management.

This paperwork may be prepared by the PC at the request of Management, but the completed document should be forwarded to the PC for review and processing to Sales Finance.

In cases where Field Sales Management authorized the employee to physically carry his/her fund amount to a new Division, Form #6217A is NOT required. The amount the employee transfers from one Division to another will transfer via the Sales Expense System when the Personnel & Administration Coordinator utilizes the PDS system to officially transfer the individual to his/her new Division.

A master copy of Form #6217A follows. Instruction for completing the form are on the reverse side.

51846 7177

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 7178

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
R.J. Reynolds Tobacco Company
RJRT Form #217A - 2/91

FIELD SALES OPERATING FUND
Transfer Request and Receipt

A - Transfer Funds From:

Employee Name ______________________ Account Number ______________

Amount Transferred $ ______________________ Division Number ______________

Beginning Fund Balance $ ______________

Fund Decrease $ ______________

Ending Fund Balance $ ______________

*Employee Signature ______________________________ Date ______________

B - Transfer Funds To:

Employee Name ______________________ Account Number ______________

Amount Transferred $ ______________________ Division Number ______________

Beginning Fund Balance $ ______________

Fund Increase $ ______________

Ending Fund Balance $ ______________

*Employee Signature ______________________________ Date ______________

*I understand that this Field Sales Operating Fund is to be used by me to purchase merchandise (manufactured by R.J. Reynolds Tobacco Company) from distributors at the prevailing wholesale price, and for expenses in conducting other Company business. *I further understand that I will be accountable for this Field Sales Operating Fund.* Upon termination of my employment with the Company, or whenever otherwise requested by the Company, I agree to repay the above ending fund balance.

APPROVAL

	NAME	TITLE/DIVISION	SIGNATURE	DATE
Initiated By:				
Approved By:				

Reason for Transfer (Must Be Completed): ______________________________

____

Original: Sales Finance, Winston-Salem

NOTE: Incomplete forms will be returned to the initiator for completion.

51846 7179

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

INSTRUCTIONS

Field Sales Operating Fund Transfer Request and Receipt

This form is used to transfer existing funds between two employees within the same Division. This form must be completed and signed by both employees. Section A of this form is for the employee whose funds are being decreased. Section B is for the employee whose funds are being increased. Both employees must make a copy of this form for their records. This form represents a receipt for the transaction. *(RJRT Form 3313 receipt no longer required.)*

Division, Region, or Area Management completes the form, including employee data, beginning fund balance, fund decrease/increase, and ending fund balance for both employees. Please note that any transactions sent to Sales Finance since the last listing must be taken into consideration when indicating the beginning fund balance. Employee's current fund balance can also be obtained by consulting the employee inquiry screen in SES.

The employee reviews the data/balances and signs the form.

The form is then submitted to the proper authority level for approval. In some cases, this may be the same person as the initiator.

Copies are made to be retained by Field Sales Management and the employees.

The original completed form is mailed to Sales Finance, Winston-Salem. Forms sent to any other location will result in a delay in processing.

51846 7180

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Fund Reduction

This function applies when an employee's current assignment does not warrant the amount of funds and/or the employee is terminated or resigns from the Company. The reduction amount is collected by Management in the form of a check made payable to RJRT. The check is forwarded with completed Form 6217B to the Operations Unit for review and processing to Sales Finance.

While Management will again initiate this function, the PC may be requested to prepare Form #6217B. When form is properly completed, it will be forwarded to the Operations Unit for review by the PC and to Sales Finance for processing, along with the fund amount via check.

A master copy of Form #6217B follows. Instruction for completing the form are on the reverse side.

51846 7181

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 7182

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
R.J. Reynolds Tobacco Company
RJRT Form 6217B - 2/91

FIELD SALES OPERATING FUND
Reduction Request and Receipt

Employee Name ______________________ Account Number ______________

Reduce Fund $ ______________________ Division Number ______________
(AMOUNT OF CHECK ATTACHED)

Beginning Fund Balance $ ______________

Fund Reduction $ (______________)

Ending Fund Balance $ ______________

I understand that this Field Sales Operating Fund is to be used by me to purchase merchandise (manufactured by R.J. Reynolds Tobacco Company) from distributors at the prevailing wholesale price, and for expenses in conducting other Company business. I further understand that I will be accountable for this Field Sales Operating Fund. Upon termination of my employment with the Company, or whenever otherwise requested by the Company, I agree to repay the above ending fund balance.

Employee Signature ______________________ Date ______________

APPROVAL

	NAME	TITLE/DIVISION	SIGNATURE	DATE
Initiated By:				
Approved By:				

Reason for Reduction (Must Be Completed) ______________________

Original: Sales Finance, Winston-Salem

NOTE: Incomplete forms will be returned to the initiator for completion.

51846 7183

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

INSTRUCTIONS

Field Sales Operating Fund Reduction Request and Receipt

This form is used to reduce the amount of existing funds for an individual. This occurs only when the full amount or a partial amount of the fund is collected by Field Sales Management, and a check written made payable to RJRT and sent to Sales Finance to reduce or clear employee's existing fund. This form must be completed and approved prior to processing. (RJRT Form 3313 receipt no longer required.) The employee must make a copy of this form for their records. This form represents a receipt for the transaction.

Division, Region, or Area Management completes the form, including employee data, beginning fund balance, fund reduction and ending fund balance for the employee. Please note that any transactions sent to Sales Finance since the last listing must be taken into consideration when indicating the beginning fund balance. Employee's current fund balance can also be obtained by consulting the employee unquiry screen in SES.

The employee reviews the data/balances, provides Field Sales Management with a check payable to RJRT for the amount of the fund reduction, and signs the form.

The original form is then submitted to the proper authority level for approval. In some cases, this may be the same person as the initiator.

Copies are made to be retained by Field Sales Management and the employees.

The original completed form and attached check is mailed to Sales Finance, Winston-Salem. Forms sent to any other location will result in a delay in processing.

51846 7184

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Confirming Fund Balances

MONTHLY CONFIRMATION

1. Each month, a Field Sales Operating Fund listing reflecting all activity processed through month-end is available to each Division and Region Operations Unit. These reports, available through the SIS Historical Print Menu, should be forwarded to appropriate Division Management, which will review and verify the FSOF listing for all individuals reporting to them.

   - No employee signatures are required as part of this review.
   - This review does NOT need to be returned to the Operations Unit.
   - Discrepancies will be noted, and appropriate documentation of these discrepancies should be returned to the Operations Unit. The PC will forward this documentation to Sales Finance anytime discrepancies are noted.

2. The Fourth-Quarter Annual FSOF Listing reflecting all activity processed through month-end is also available through SIS Historical Print Menu. Forward this listing to appropriate Division Management for review.

   Management will forward any discrepancies, with supporting documentation to the PC for processing, to Sales Finance. This process should be completed no later than February 15.

3. Copies of FSOF Listing should be maintained in the Operations Unit Personnel & Administration Coordinator files. Retention should be for one year plus current.

Fund Shortages at Termination

If an employee cannot account for his/her Fund on termination, the Division Manager, Region Manager, or Area Vice-President to whom the employee reports must immediately telephone the Sales Personnel and Sales Finance Departments. The PC will not be directly involved but should be aware of key issues regarding this process.

Management will report the following information to Winston-Salem:

- Shortage in the account
- Amount of Cash on Hand
- Value of inventory stock on hand
- Date and amount of unreimbursed expense reports
- Any other documentation supporting disbursement of the funds (jobber credits, bill-throughs, etc.)
- Sales Personnel and Sales Finance will advise procedures for handling shortage on a case-by-case basis.

Jobber Agreement Form

Each Sales Representative is required to complete Jobber Agreement Form #4685 for each jobber from which merchandise will be purchased. The Operations Unit must maintain and file these forms when completed. A master copy of the Jobber Agreement form for distribution to Sales Representatives as requested follows.

51846 7185

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 7186

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJRT Form 4685 – Rev. 10/82
Commodity No. 04685-4

JOBBER AGREEMENT FORM

Date ____________________

In order to aid in the prevention of out-of-stock circumstances among retailers who are your customers, and in order to assist in proper rotation of merchandise which you have sold, the undersigned hereby agrees to obtain on consignment from you, the jobber, from time to time, as needed, certain merchandise manufactured by R.J. Reynolds Tobacco Company.

The undersigned is hereby obligated to collect any sums due from any retail dealers who may need portions of said merchandise, at the price specified by you, the jobber, and the undersigned further agrees to remit to you, the jobber, all sums due for said merchandise, or to return the merchandise in good condition to you, the jobber, as owner.

The undersigned has authority to act, in this connection, as agent, only for jobbers of products manufactured by R.J. Reynolds Tobacco Company. All sales shall be considered to be the sales of the jobber, and all prices will be determined by the jobber, in accordance with the jobber's established price of such products to retail dealers.

The undersigned hereby agrees, at the request of the jobber, to make cash deposits as security for merchandise delivered on consignment. The jobber agrees that such deposits received as security will be returned upon return of any merchandise covered by the consignment account.

If the foregoing is agreeable to you, please indicate your acceptance by signing in the space indicated below.

Very truly yours,

____
Sales Representative

Accepted and Agreed to

____
Jobber

51846 7187

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Handling Break-ins/Uncollected Bill-throughs

From time to time, a loss of Company materials, merchandise, equipment, solvency funds, or bill-throughs is reported due to a vehicle break-in or uncollected bill-through. When this situation arises, Management must

- Determine whether the loss was preventable
  - If the loss was preventable due to employee negligence, the employee will be required to reimburse the full amount of the loss to the Company.
  - If the loss was not preventable or due to negligence on the part of the employee, Management may request reimbursement for the loss.

APPROVAL AUTHORITY FOR VEHICLE BREAK-INS, UNCOLLECTIBLE BILL-THROUGHS, AND RETURNED CHECKS

Management will request copy of Form #5237 from PC. Management uses this form to describe details of event, itemized list of goods stole, and amount. When properly completed, this form will be returned to the Operations Office and should be forwarded to the Regional Sales Manager for approval.

A master copy of Form #5237 follows.

51846 7188

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 7189

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJRT Form 5237 - 3/89

F. S. O. F. REIMBURSEMENT REQUEST
(PLEASE TYPE)

TO: SALES PERSONNEL

DATE: ____________

FROM: ____________

DIVISION NUMBER: ____________

ISSUE CHECK TO: ____________

AMOUNT TO BE REIMBURSED: $ ______ CENTS ____

EMPLOYEE NAME: ____________

ACCOUNT NUMBER: ____________

(Attachments For)	(Attachments For)	(Attachments For)
☐ VEHICLE BREAK-IN	☐ UNCOLLECTED BILL-THROUGH	☐ OTHER
- Police Report	- RJR Sales Company Invoice	Explain:
- Statements of employee Field Sales Operating Funds		

SPECIAL PAYMENT INFORMATION TO APPEAR ON CHECK STUB: ____________

BRIEF OVERVIEW OF CIRCUMSTANCES SUPPORTING REQUEST FOR REIMBURSEMENT:

APPROVALS:

DIVISION MANAGER (DIV. NO.)	REGION MANAGER	SALES AREA OFFICE
DATE:	DATE:	DATE:

51846 7190

TO BE COMPLETED BY SALES DEPARTMENT:

SALES PERSONNEL DEPARTMENT	VICE PRESIDENT - FIELD SALES OPERATIONS
DATE:	DATE:

CHECK TO BE DATED: ____________

04 / 80/ / /821
GENERAL LEDGER CODE

RETURN CHECK TO: ____________

FLOOR: ______ BLDG: ______ DATE NEEDED: ____________

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Cigarette Excise Tax Increases

Details of procedures regarding administration of excise tax increases are communicated prior to the date of the increase by Winston-Salem. These instructions are normally quite detailed and often provide needed forms for use by the Field.

VEHICLE INVENTORY

Winston-Salem is responsible for determining the proper procedures for handling excise tax increases. When direction is received, the Regions Operations Manager, with the Personnel & Administration Coordinator, should develop a plan to handle the administration of these procedures centrally, THROUGH THE OPERATIONS OFFICE.

GRATIS PRODUCT

Some Sales Representatives and Divisions carry gratis product to supply customers. All gratis product in car stock and Divisions offices should be inventoried (by pack size 20/25s).

- Record the name and address of the employee and the event for which the product was on the inventory sheet.
- Forward this inventory to Betty Royal, Department of Taxation, Winston-Salem, no later than the third day after the tax increase.

The Region Operations Manager and the PC should develop a centralized method of receiving and forwarding these inventory sheets to Winston-Salem.

B1G1F PRODUCT

If any B1G1F product is stamped at the old rate on the wholesaler's floor, the difference between the old and the new tax rates should be paid by the Operations Office to the wholesaler.

The Region Operations Manager should develop a format for obtaining this information from the Field. All forms and data regarding these wholesaler B1G1F totals should be forwarded to the PC for processing.

- Because the Systems Coordinator handles Temporary Payment System activities, the PC should assist and communicate details of these issues to the SC.

  A copy of the voucher paying this difference (with RJRT invoice number covering the shipment involved noted thereon), along with a copy of the wholesaler's invoice should be forwarded to Betty Royal, Department of Taxation, Winston-Salem, no later then the third day after the tax increase.

51846 7191

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7192

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7193

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Issued: 8/93

COMMUNICATIONS

4

Summary

The Personnel & Administration Coordinator is primarily responsible for answering the phone in the Operations Unit office and directing messages and miscellaneous information to sales personnel via voice mail.

While each Coordinator will maintain a separate phone number at the Operations office, the PC will find themselves forwarding calls regarding specific issues to the appropriate Coordinator. Therefore, a knowledge of the accountabilities of each of their Operations Unit colleagues is important.

Because the PC will be the caller's initial contact with the Company, courtesy and professionalism are very important when answering or making phone calls.

General Telephone Etiquette

- Answer promptly, within 2 or 3 rings
- Identify Company
- Listen to the caller
- Obtain caller's name
- Ask to be of help and determine the purpose of the call
- Make caller aware of situations:
  - Is caller being put on hold? If so, check back within reasonable amount of time
  - Is caller being transferred?
- Take an accurate message
- Restate caller's name, number and message
- Close pleasantly

Fielding Complaints

- Listen carefully to the caller
- Keep calm and remain pleasant
- Express interest
- Show concern
- Ask questions to clarify problem
- Explain action undertaken
  - Identify personnel who will address concern
- Follow through
  - Communicate issues to appropriate personnel

Calls to Home Office in Winston-Salem

- Dial 1-800-852-8015
- After dialing this number, a dial tone will be heard. At this time, any individual in the Home Office can be reached by dialing their 4-digit extension number and the # symbol.
  - If the extension # is unknown, the dial 0 and # and a company operator will provide assistance
- Following is a current guide to extensions of personnel located at the Home Office. The guide is arranged alphabetically, by department.

51846 7194

51846 7195

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Issued: 8/93

COMMUNICATIONS

4

Home Office Contact Reference Guide

Department	Contact	Extension
Home Office - 1-800-852-8015 (All Departments) (all extensions can be reached through this number		
Order Department - 1-800-334-8682 (Tobacco Customer Services/Cig Orders)		
Employment Practices (Discrimination claims, Subpoenas, Corrective action, Involuntary terminations)	Paul Macksood Stan Driskell	6846 3680
Employment (New hires/procedures)	Dot Draper	2339
Employment Verification	Katrina Oakley	1611
Field Sales Operating Fund	Margaret Davis	0318
Medical	Dr. Hubert F. Bonfili	3024
Payroll Department	Mamie Douglas	2148
Relocation Expense	Jeannette Cornelius	7597
Unemployment Claims	Becky Weeden	6802
Safety (Worker's Compensation)	Debi Cutright Stan Driskell	6313 3680
Legal (personal injury/property damage)	Mike Johnson	7805
Shipping (lost/damaged shipments)	Nancy McGlamery or Clark Golden	1796
Sales Development (P&P Manual/Communication)	John Olenick	6112
Sales Finance (Drafts/Temporary Pmt Sys)	Dennis Jacobs	1760

51846 7195

Credit	Bob Schmay	1410
Sales Operations (Returned Goods)	Bruce Hatter	7889
Fleet Administration	Debbie Hunter	7602
Salary Administration (Increases/PAF/Auto)	Mike Judkins Dot Draper	0472 2339

51846 7197

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
	FAX NUMBERS 741				
	FAX-BIAD			1566	7
	FAX-BIAD			7649	7
	FAX-BRAND CAMEL/SAVINGS			3002	5
	FAX-BRAND SALEM/WINSTON			2300	6
	FAX-BRAND VAN/MORE/NOW			3012	9
	FAX-FINANCE			7555	3
	FAX-INFOR ANALYSIS			2813	7
	FAX-MEDIA			3220	3
	FAX-MERCHANDISING			7989	8
	FAX-PROM PRODUCTION			7808	4
	FAX-PROM SALES			5327	4
	FAX-PROMOTION DEPT			622	4
	FAX-SALES MAT'L LOG			7609	4
	FAX-SALES PLAN COMM			7851	5
	FAX-SALES/MKT PER			4684	8
	FAX-SPORTS MKT			2800	13-PL
	FAX-SPORTS MKT			6651	13-PL
	FAX-SPORTS MKT			7793	13-PL
	FAX-TRADE DEV			4214	8
	FAX-TRADE MKTING			2665	5
	Planning	Cheek	SHELBY	3146	9
x	Marketing/ Sales	Hanes J.H.	JUDI	6315	15
	Planning	Hill	ROGER	7284	9
	Planning	Hoots	PAT	7852	9
	Planning	Kauffeld	RICH	6812/681	9
x	Marketing/ Sales	Schroer J.C.	JIM	2202	15
	Planning	Summers	RON	1628/528	9
	Consultant	Vajta P.	PETER	5093	6
	SALES DEPARTMENT				
95	Account Mkt. Services	Buzzard C.T.	BUZZ	6139	4
95	Account Mkt. Services	Crawford R.H.	ROBERT	2633	4
95	Account Mkt. Services	Sanders R.M.	RICK	2290	4
95	Account Mkt. Services	Tharpe S.B.	SHIRLEY	2292	4
90	Forsyth Pdts	Crutchfield J	JANET	5235	6
90	Forsyth Pdts	Farmer J.S.	JIM	0470	6
90	Forsyth Pdts	Helm J.R.	JIM	6102	6
90	Forsyth Pdts	Hutchins C.	CINDY	2474	6
90	Forsyth Pdts	Nutting M.L.	MICKEY	4736	6
90	Forsyth Pdts	Scott G.J.	GWEN	3340	6
90	Forsyth Pdts	Smith G.W.	GEORGE	5234	6
88	Info. Analysis/Sales Applications	Beck F.A.	FRANK	0471	7
88	Info. Analysis/Sales Applications	Boyd S.E.	SUSAN	7023	7
88	Info. Analysis/Sales Applications	Faust D.H.	DIANE	7598	7
88	Info. Analysis/Sales Applications	Fields S.H.	STEPHANIE	7742	7

51846 7193

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
88	Info. Analysis/Sales Applications	Jessup S.M.	SANDRA	3331	7
88	Info. Analysis/Sales Applications	Kruth M. C.	MARC	0688	7
88	Info. Analysis/Sales Applications	Lancaster W.C.	BILL	0100	7
88	Info. Analysis/Sales Applications	Qualkinbush S.R	STEVE	0686	7
809	Merchandising	Baroody G.T.	GEORGE	7271	8
809	Merchandising	Bowman J.H.	JULIE	7754	8
809	Merchandising	Broom K.	KAY	2770	8
809	Merchandising	Carrick D.	DIANE	2261	8
809	Merchandising	Cook W.D.	DAVID	6550	8
809	Merchandising	Crowell K.B.	KNOX	6435	8
809	Merchandising	Grout R. B.	RON	2196	8
809	Merchandising	Haynes L.B.	LINDA	2720	8
809	Merchandising	Hedrick K.B.	KEN	2530	8
809	Merchandising	Hirsch M.S.	MARK	6146	8
809	Merchandising	Lawson P.	PEGGY	0465	8
809	Merchandising	Loftin J.R.	JAY	1625	8
809	Merchandising	Masten W.S.	WINONA	1642	8
809	Merchandising	McLaurin J.	JACKIE		8
809	Merchandising	MTS Room		0999	8
809	Merchandising	Olson J.A.	JAN	5130	8
809	Merchandising	Orlngderff B.E.	BUTCH	7463	8
809	Merchandising	Powers J.E.	JIM	2195	8
809	Merchandising	Whiteman W.R.	WALT	0466	8
88	Plan Comm & Sales Tech.	Barnett A.L.	AL	6862	5
88	Plan Comm & Sales Tech.	Bisese C. L.	CATHY	5761	5
88	Plan Comm & Sales Tech.	Carswell C.J.	CARLA	7631	5
88	Plan Comm & Sales Tech.	Church L.	LOIS	6121	5
88	Plan Comm & Sales Tech.	Driskell S.B.	STAN	3680	5
88	Plan Comm & Sales Tech.	Duffy W. J Jr	BILL	5776	5
88	Plan Comm & Sales Tech.	Ellegate J. J.	JOHN	5760	5
88	Plan Comm & Sales Tech.	Luongo R.J.	DICK	6110	5
88	Plan Comm & Sales Tech.	Lyons M	Mary	0487	5
88	Plan Comm & Sales Tech.	Olenick J.M.	JOHN	6112	5
88	Plan Comm & Sales Tech.	Reid S.G.	SHARON	2584	5
88	Plan Comm & Sales Tech.	Simkins B.J.	BARBARA	6149	8
88	Plan Comm & Sales Tech.	Woody C.L.	CHARLOTTE	0463	5
853	Prom-Promotion Prod.	Brown B.D.	BARBARA	2930	4
853	Prom-Promotion Prod.	Burton K.M.	KEN	2602	4
853	Prom-Promotion Prod.	Dawson S.E.	SHARON	6170	4
853	Prom-Promotion Prod.	Evans R.W.	RICK	6040	4
853	Prom-Promotion Prod.	Gessner G.	GAIL	2767	4
853	Prom-Promotion Prod.	Hughes K.	KAREN	6593	4
853	Prom-Promotion Prod.	Leinster J.A.	JOE	6947	4
853	Prom-Promotion Prod.	McGee R.L.	ROBERT	4497	4
853	Prom-Promotion Prod.	Petticord J.O.	JANIE	3360	4
853	Prom-Promotion Prod.	Soyars M.B.	MICHELLE	5291	4
853	Prom-Promotion Prod.	Stone C.A.	CHARLES	2548	4

51846 7199

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
853	Promotion	Basche' D.C.	DIANA	2947	4
853	Promotion	Beam T. C.	TERRI	3945	4
853	Promotion	Bledsoe M.C.	MAUDE	2609	4
853	Promotion	Bowdish M.N.	MARY	0618	4
853	Promotion	Calloway W.B.	WENDY	2509	4
853	Promotion	Cook K. F.	KATHY	0945	4
853	Promotion	Covington S.A.	SUE	7819	4
853	Promotion	Dean J.J.	JOHN	2787	4
853	Promotion	Douthit F.	FORESTINE	0628	4
853	Promotion	Giddens K.	KAREN	5519	4
853	Promotion	Hairston G.T.	GLORIA	2784	4
853	Promotion	Hamilton E.J.	JEAN	4610	4
853	Promotion	Howington J.H.	JEAN	6185	4
853	Promotion	Jennings C.D.	CARY	4574	4
853	Promotion	Jones D.L.	DEBRA	5875	4
853	Promotion	Kearns K.F.	KAREN	7221	4
853	Promotion	King S.H.	SUSAN	2511	4
853	Promotion	Mabe R.Y.	YEVONNE	2721	4
853	Promotion	McCaffrey K.V.	KAY	7695	4
853	Promotion	McCullough E.C.	ESSIE	6308	4
853	Promotion	McKenna G.W.	JERRY	0627	4
853	Promotion	McKinney J.R.	JUDY	7473	4
853	Promotion	Mendenhall M.W.	MICHELLE	3214	4
853	Promotion	Moore K.M.	KAYE	2772	4
853	Promotion	Phelps G.L.	GARY	7572	4
853	Promotion	Pierre J.C.	JENNIFER	7548	4
853	Promotion	Rider D.K.	DONNA	2805	4
853	Promotion	Smith L.S.	LYNNE	6417	4
853	Promotion	Smith T.M.	TERESA	5385	4
853	Promotion	Strickland S.C.	CARSON	0469	4
853	Promotion	Tilley A.	ANDREW	7569	4
853	Promotion	Tilley M.J.	JEANNE	6971	4
853	Promotion	Toft H.C.	CHRIS	4534	4
xx	Sales	Ford Y.W. Jr.	YANCEY	6088	15
xx	Sales	Joyce A.	ANN	6123	15
88	Sales Info. Systems	Garner M. A.	MARK	1816	7
88	Sales Info. Systems	Huneycutt D.H.	DANNY	1563	7
88	Sales Info. Systems	Jordan F.I.	FRANK	7908	7
88	Sales Info. Systems	Korczyk S.S.	SHARON	2934	7
88	Sales Info. Systems	Lee B.	BONITA	5090	7

51846 7200

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
88	Sales Info. Systems	Marshall A.G.	TONY	5108	7
88	Sales Info. Systems	Minner W.C.	CHRIS	3745	7
88	Sales Info. Systems	Perry V.J.	VANESSA	6113	7
88	Sales Info. Systems	Word K.B.	KAY	2723	7
190	Sales Mat'l Logistics	Adams K.	KAY	7107	4
190	Sales Mat'l Logistics	Ashby C.D.	DEAN	3332	4
190	Sales Mat'l Logistics	Brown W.H.	BILL	3324	4
190	Sales Mat'l Logistics	Chappell B.J.	BONNIE	3347	4
190	Sales Mat'l Logistics	Eaton J.	JANE	2743	4
190	Sales Mat'l Logistics	Esposito D.R.	DON	6204	4
190	Sales Mat'l Logistics	Gurzenhauser C. J.	CHRIS	6997	4
190	Sales Mat'l Logistics	Howell J.	JUDY	7728	4
190	Sales Mat'l Logistics	Lewis A.H.	ANDREA	3305	4
190	Sales Mat'l Logistics	Marsh D.G.	DONNA	6432	4
190	Sales Mat'l Logistics	Mason B.C.	BARBARA	3342	4
190	Sales Mat'l Logistics	Nicks G.M.	GERALDINE	3328	4
190	Sales Mat'l Logistics	Overfelt G.W.	GARY	0460	4
190	Sales Mat'l Logistics	Roberts R.L.	ROBERT	0461	4
190	Sales Mat'l Logistics	Roseman H.R.	HAROLD	6188	4
190	Sales Mat'l Logistics	Shore J.L.	JONNIE	6429	4
190	Sales Mat'l Logistics	Snow W.D.	WANDA	3325	4
190	Sales Mat'l Logistics	Wood D	DONNA	3333	4
804	Sales/Cust. Fin. Serv.	Brannan J.	JENNIFER	5129	3
804	Sales/Cust. Fin. Serv.	Davis M.	MARGARET	0318	3
804	Sales/Cust. Fin. Serv.	Dwiggins J.	JEAN	3645	3
804	Sales/Cust. Fin. Serv.	Fox P.	PENNY	6557	3
804	Sales/Cust. Fin. Serv.	Harris W.	RAY	3445	3
804	Sales/Cust. Fin. Serv.	Kies J.	JEFF	7417	3
804	Sales/Cust. Fin. Serv.	Mathis S.	STEVE	1644	3
804	Sales/Cust. Fin. Serv.	Noxon	KATHRYN	2559	3
804	Sales/Cust. Fin. Serv.	Sears J.	JERALD	6105	3
804	Sales/Cust. Fin. Serv.	Smith R.	BOB	2263	3
815	Sales/Marketing Personnel	Barnhardt J.G.	JOHN	NEW	8
815	Sales/Marketing Personnel	Christopher J.M.	JEFF	7629	8
815	Sales/Marketing Personnel	Cooper R.	ROBIN	6125	8
815	Sales/Marketing Personnel	Cornelius J.M.	JEANNETTE	7597	8
815	Sales/Marketing Personnel	Cutright D.W.	DEBI	6313	8
815	Sales/Marketing Personnel	Draper D.C.	DOT	2339	8
815	Sales/Marketing Personnel	Judkins W.L II	MIKE	0472	8
815	Sales/Marketing Personnel	Lynch A.F.	ALICE	5601	8

51846 7201

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
815	Sales/Marketing Personnel	Lynch A.F.	ALICE	5601	8
815	Sales/Marketing Personnel	Macksood P.W.	PAUL	6846	8
815	Sales/Marketing Personnel	Macleod S.R.	STEVE	6316	8
815	Sales/Marketing Personnel	Maguire J.V.	JIM	7924	8
815	Sales/Marketing Personnel	Paulson M. L.	MARK	7150	8
815	Sales/Marketing Personnel	Plowman K.	KATIE	7170	8
815	Sales/Marketing Personnel	Prevette S.	SUSAN	7361	8
815	Sales/Marketing Personnel	Renehan T.M.	TOM	5814	8
815	Sales/Marketing Personnel	Riser D. B.	DAVE	5501	8
815	Sales/Marketing Personnel	Snow R.D.	BOB	7169	8
815	Sales/Marketing Personnel	Tucker W.F.	WAYNE	7462	8
815	Sales/Marketing Personnel	Williams D.M.	DON	5503	8
815	Sales/Marketing Personnel	Wooten B.G.	BILLIE	2293	8
97	Trade Development	Baumann J. F.	FRED	7149	8
97	Trade Development	Gaillard R.C.	RALPH	2614	8
97	Trade Development	Gregory A.	ANN	5120	8
97	Trade Development	Hatter B.D.	BRUCE	7889	8
97	Trade Development	Regan J.W.	JACK	5360	8
97	Trade Development	Schreiber L.S.	LARRY	1621	8
97	Trade Development	Vestal F.H.	FRANK	7753	8
822	Trade Development	Anderson G.	GOLDIA	2734	8
822	Trade Development	Gordy C.	CATHY	6530	8
822	Trade Development	Jones M.L.	MICKEY	6613	8
822	Trade Development	Preston M.H.	MARTHA	7583	8
822	Trade Development	Spach C.A.	CINDY	7437	8
822	Trade Development	Trader T.W.	TOM	6956	8
87	Trade Marketing	Crim M.	MARY RUTH	2712	8
87	Trade Marketing	Hendrix R.S.	SAM	7168	8
89	Trade Marketing	Butner J.	JANET	7901	5
89	Trade Marketing	Drew J.H.	JOHN	3219	5
89	Trade Marketing	Fiori R. L.	BOB	2564	5
89	Trade Marketing	Young R.N.	RICK	7758	5
	MARKETING DEPARTMENT				
854	Business Info/Analysis Dept	Abbott M.P.	MARTHA	7501	7
854	Business Info/Analysis Dept	Abernethy R.	RICK	1416	7

51846 7202

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
854	Business Info/Analysis Dept	Andrews A.J.	ANN	7378	13-PL
854	Business Info/Analysis Dept	Bellis J.V.	JACK	7362	6
854	Business Info/Analysis Dept	Bils J.	JULIE	0434	6
854	Business Info/Analysis Dept	Bowman C.S.	CYRUS	4491	13-PL
854	Business Info/Analysis Dept	Brewer L.A.	LEE ANN	7413	7
854	Business Info/Analysis Dept	Brinson R.S.	ROBIN	6300	13-PL
854	Business Info/Analysis Dept	Burgess L.K.	LINDA	6835	B-6
854	Business Info/Analysis Dept	Cohen P.S.	PENNY	7392	6
854	Business Info/Analysis Dept	Collins R.F.	BECKY	7423	13-PL
854	Business Info/Analysis Dept	Cooley S.A.	SARA	7826	7
854	Business Info/Analysis Dept	Daniels M.M.	MARIE	7797	13-PL
854	Business Info/Analysis Dept	Davis G.R.	GAIL	6981	5
854	Business Info/Analysis Dept	Doten W.W.	BILL	7286	7
854	Business Info/Analysis Dept	Doub J.M.	JUDY	7985	B-6
854	Business Info/Analysis Dept	Douglas D.K.	DOT	7469	5
854	Business Info/Analysis Dept	Dube L.G.	LYNN	4624	7
854	Business Info/Analysis Dept	Etzel E.C.	EMILY	7319	6
854	Business Info/Analysis Dept	Fackelman E.J.	ERNIE	7409	7
854	Business Info/Analysis Dept	Fields T.F.	TIM	7307	7
854	Business Info/Analysis Dept	Fulk P.B.	PEGGY	7383	7
854	Business Info/Analysis Dept	Fulp B.D.	BETSY	0753	13-PL
854	Business Info/Analysis Dept	Galyan P.E.	PHIL	7371	7
854	Business Info/Analysis Dept	Gemma J.L.	JIM	7471	7
854	Business Info/Analysis Dept	Granderson B.M.	BRENDA	7743	13-PL
854	Business Info/Analysis Dept	Gray T.I.	TERESA	7567	7
854	Business Info/Analysis Dept	Hardman E.R.	ED	7574	7
854	Business Info/Analysis Dept	Harmon G.T.	TODD	5374	7
854	Business Info/Analysis Dept	Harris L.A.	CINDY	0282	7
854	Business Info/Analysis Dept	Hawkins S.C.	SHARI	6476	7
854	Business Info/Analysis Dept	Hayes D.H.	DEBBIE	6311	7
854	Business Info/Analysis Dept	Henderson S.A.	SHERYL	7404	7
854	Business Info/Analysis Dept	Holden S.O	SANDRA	3782	13-PL
854	Business Info/Analysis Dept	Hollander S.W.	STEVE	6015	7
854	Business Info/Analysis Dept	Horton H.H.	HELEN	7566	13-PL
854	Business Info/Analysis Dept	Hull J.H.	JEAN	6994	7
854	Business Info/Analysis Dept	Hunter C.S.	CINDI	7337	6
854	Business Info/Analysis Dept	Hunter J.F.	FRANK	7801	13-PL
854	Business Info/Analysis Dept	Hunter W.R.	WANDA	5634	B-6
854	Business Info/Analysis Dept	Jarrell C.R.	RICK	7379	13-PL
854	Business Info/Analysis Dept	Kelly L.D.	LISA	7928	7
854	Business Info/Analysis Dept	Kennedy J.C.	CONNOR	7422	7
854	Business Info/Analysis Dept	Lindley G.S.	GWEN	7237	7
854	Business Info/Analysis Dept	Lockery D.H.	DEBBIE	3123	13-PL

51846 7203

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
854	Business Info/Analysis Dept	Marshall J.Y.	JEANNIE	6925	7
854	Business Info/Analysis Dept	Miller B.K.	BARRY	7545	B-6
854	Business Info/Analysis Dept	Mills V.P.	VIC	6977	9
854	Business Info/Analysis Dept	Mitchell C.G.	CAROL	6474	9
854	Business Info/Analysis Dept	Monda N.R.	NANCY	0590	6
854	Business Info/Analysis Dept	Moore J.R.	JERRY	7408	7
854	Business Info/Analysis Dept	Murphy D.H.	DAN	7322	5
854	Business Info/Analysis Dept	Needham L.Z.	LORA	4439	13-PL
854	Business Info/Analysis Dept	Pasterczyk R.C.	REGGIE	7401	5
854	Business Info/Analysis Dept	Philyaw A.P.	AVIS	7485	7
854	Business Info/Analysis Dept	Reese B.R.	BONNIE	5138	13-PL
854	Business Info/Analysis Dept	Robertson J.H.	JANIS	7446	B-6
854	Business Info/Analysis Dept	Rodgers H.R.	RAY	7744	7
854	Business Info/Analysis Dept	Sasso L.A.	LARRY	5154	B-6
854	Business Info/Analysis Dept	Schmidt D.E.	DONALD	0919	7
854	Business Info/Analysis Dept	Scism A.K.	ANITA	7416	7
854	Business Info/Analysis Dept	Sink S.P.	SANDRA	7363	7
854	Business Info/Analysis Dept	Smith C.M.	CLARE	7339	5
854	Business Info/Analysis Dept	Smith L.B.	LYLE	7346	7
854	Business Info/Analysis Dept	Smith S.W.	SUSANNE	1336	13-PL
854	Business Info/Analysis Dept	Swaim M.C.	MARIETTA	7421	7
854	Business Info/Analysis Dept	Thompson K.H.	KAROLYN	1752	13-PL
854	Business Info/Analysis Dept	Tucker B.M.	BONNIE	7407	6
854	Business Info/Analysis Dept	Tussey C.R.	CAROLYN	2220	6
854	Business Info/Analysis Dept	Walkup D.F.	DONNA	1732	13-PL
854	Business Info/Analysis Dept	Weber J.D.	DOUG	7317	7
854	Business Info/Analysis Dept	White D.F.	DEBBIE	7356	7
854	Business Info/Analysis Dept	Whitlatch W.P.	BILL	7318	7
854	Business Info/Analysis Dept	Williams J.R.	JANNIE	0665	7
854	Business Info/Analysis Dept	Williard L.F.	LINDA	7406	7
854	Business Info/Analysis Dept	Witner T.F.	TERESA	0429	5
854	Business Info/Analysis Dept	Wood K.L.	KRISTEN	2146	7
854	Business Info/Analysis Dept	Wooten D.S.	DEBBIE	7475	7
855	Business Unit Camel	Blackmer E.M.	ED	2434	5
855	Business Unit Camel	Brady M.R.	MARTHA	2590	5
855	Business Unit Camel	Burrows D.S.	DIANE	7331	5
855	Business Unit Camel	Cattano J.T.	JENNIFER	2711	5
855	Business Unit Camel	Clayton L.W.	LAWRENCE	5092	5
855	Business Unit Camel	Davis C.M.	CHARLES	3315	5
855	Business Unit Camel	DeLos Reyes F.R.	FERNANDO	3446	5
855	Business Unit Camel	Howell A.W.	ALETA	0914	5
855	Business Unit Camel	Lawrence L.D.	LYNN	2271	5

51846 7204

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
855	Business Unit Camel	Leary E.C.	NED	0432	5
855	Business Unit Camel	Martin D.J.	DIANA	3319	5
855	Business Unit Camel	Roper W.J.	JACKSON	5310	5
855	Business Unit Camel	Saylor A.C.	ASTRID	7862	5
855	Business Unit Salem	Bomgardner D.L.	DENNY	3314	6
855	Business Unit Salem	Burgess J.S.	JANIS	2774	6
855	Business Unit Salem	Coggins J.	JOANNE	6511	6
855	Business Unit Salem	Dixon J.C.	JOHN	5305	6
855	Business Unit Salem	Jeter S.L.	SINATRA	2641	6
855	Business Unit Salem	Krishock D.A.	DAVID	3015	6
855	Business Unit Salem	Landry E. C	ED	0496	6
855	Business Unit Salem	Miller M.A.	MEL	4614	6
855	Business Unit Salem	O'Leary S.J.	STEVE	3466	6
855	Business Unit Salem	Rhodes E.S.	SCOTT	2466	6
855	Business Unit Salem	Shouse D.W.	DOUG	5318	6
855	Business Unit Salem	Sims B.L.	BARRIE	7415	6
855	Business Unit Salem	Winston S. D.	SHEVETTE	0494	6
855	Business Unit Savings	Davis N.D.	NATALIE	5953	5
855	Business Unit Savings	Lindquist W.S.	BILL	0430	5
855	Business Unit Savings	Lyon A.A.	AL	7995	5
855	Business Unit Savings	Montgomery N.W.	NANCY	2932	5
855	Business Unit Savings	Patterson K.C.	KAYE	2324	5
855	Business Unit Savings	Payne J.T.	JENNIFER	2711	5
855	Business Unit Savings	Pennell G.C.	CLIFF	2344	5
855	Business Unit Savings	Settle P.B.	PAM	7907	5
855	Business Unit Savings	Shaw M.W.	MIKE	2613	5
855	Business Unit Savings	Williams K.J.	KAREN	2294	5
855	Business Unit Savings	Woodham M.L.	LUCY	2230	5
855	Business Unit Technology	Faino C.M.	CAL	7911	5
855	Business Unit Van/More/Now	Fagan M.G.	MIKE	6611	9
855	Business Unit Van/More/Now	Herrman D.V.	DIRK	3304	9
355	Business Unit Van/More/Now	Joyner G.B.	GWEN	7410	9
155	Business Unit Van/More/Now	Knott I.A.	IAN	2061	9
55	Business Unit Van/More/Now	McClure M.F.	MICHAEL	2858	9
55	Business Unit Van/More/Now	Moore P.C.	PAT	2265	9
i5	Business Unit Van/More/Now	Poss M.A.	MICHAEL	0407	9
i5	Business Unit Van/More/Now	Strawsburg S.R.	STEVE	5315	9
5	Business Unit Van/More/Now	Suggs M.L.	MICHAEL	5098	9
5	Business Unit Van/More/Now	Willard Y.	YVETTE	7283	9

51846 7205

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
855	Business Unit Winston	Beasley L.J.	LYNN	2460	6
855	Business Unit Winston	Cherry C.G.	CONNIE	2199	6
855	Business Unit Winston	Clifton D.M.	DONNA	7986	6
855	Business Unit Winston	Creighton F.V.	FRAN	7352	6
855	Business Unit Winston	Douglas S.H.	SANDRA	6196	6
855	Business Unit Winston	Duffy M. F.	MIKE	0910	6
855	Business Unit Winston	Hicks S.R.	SUSAN	7956	6
855	Business Unit Winston	Moricle S.A.	SARA	2842	6
855	Business Unit Winston	Nicholson C.S.	CYNTHIA	1405	6
855	Business Unit Winston	Owens M	MARTY	0441	6
855	Business Unit Winston	Reynolds J.L.	JUACANE	2461	6
855	Business Unit Winston	Russell C. W.	CAROL	4652	6
855	Business Unit Winston	Stockdale B.K.	BRYAN	7909	6
855	Business Unit Winston	Weeks D	DOUG	0438	6
855	Business Unit Winston	Wright K.M.	MICHAEL	2895	6
855	RVS Station			0437	6
841	Direct Marketing	Drum L.R.	LISA	7172	9
841	Direct Marketing	Kelly M.	MAUREEN	2501	6
841	Direct Marketing	Kendall S.L.	SUE	7482	5
841	Direct Marketing	Knouse P.F.	PAUL	7900	6
841	Direct Marketing	Lail N.	NIKKI	2773	5
841	Direct Marketing	Mattern C.V.	CHRISTINE	6910	5
841	Direct Marketing	Michaelson P. N	PETER	7740	5
841	Direct Marketing	Wadia K.N.	K	7004	6
841	Direct Marketing	Zimmerman V.G.	VICKI	2562	5
882	Finance	Appleyard J.K.	JAYNE	2778	3
882	Finance	Arrowood P.L.	PAUL	3637	6
882	Finance	Bellis A.L.	ANDI	3628	5
882	Finance	Burick K.S.	KAREN	3613	3
882	Finance	Collins B.S.	BARBARA	7260	3
882	Finance	Cornett R.	RICK	0168	6
882	Finance	Davis J.	JEAN	7364	3
882	Finance	Fitzgerald R.K.	BOB	0345	13-PL
882	Finance	Grubbs J.H.	JUDY	6477	13-PL
882	Finance	Hardy J.C.	JUDY	3622	3
882	Finance	Hayes M.M.	MICHAEL	0394	4
882	Finance	Hill C.T.	CRAIG	3192	5
882	Finance	Hodges D.	DAVID	5878	5
882	Finance	Ince D. E.	DARRYL	0439	3
882	Finance	Keith R.S.	SCOTT	4212	6

51846 7206

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
882	Finance	Lowe J.E.	JODY	3662	6
882	Finance	Moore M.M.	MORRIS	3116	9
882	Finance	Moorefield M.	MONICA	6529	13-PL
882	Finance	Neal D.E.	DIANNE	2978	9
882	Finance	Norman L.A.	LOUISE	7636	3
882	Finance	Phelan R.K.	KEVIN	7955	3
882	Finance	Premo K. A.	KATHRYN	2689	4
882	Finance	Schamay L.	LORI	7280	3
882	Finance	Schmalfeldt R.S.	SCOTT	3683	3
882	Finance	Scott E.A.	EVERRETT	5097	3
882	Finance	Steward G.T.	TED	0399	5
882	Finance	White S.N.	SANDRA	0624	3
882	Finance	Whitehurst E.K.	KEN	0951	3
845	Marketing	Iayco D.N.	DAVE	0424	8
845	Marketing	Stewart A.Y.	ANN	0423	8
857	Media	Bennett C.W.	CHARLES	7223	3
857	Media	Birrittieri T.C.	TOM	7397	3
857	Media	Bruce L.J.	LEVORA	7516	3
857	Media	Carter K.L.	KATIE	7620	5
857	Media	Dilworth R.L.	RICHARD	7203	3
857	Media	Egan M.B.	MIKE	7226	3
857	Media	Gabriel W.A.	GABE	7483	6
857	Media	Gough L.E.	LINDA	7466	3
857	Media	Grier P. H.	PAULETTE	7186	3
857	Media	Hairston C.G.	CAROLYN	7214	3
857	Media	Hampton K.G.	KAY	7458	3
857	Media	Haynes C.L.	CARL	7227	3
857	Media	Ittermann P.F.	PATTI	7479	6
857	Media	Jackson E.M.	ELIZABETH	7019	3
857	Media	McLean D.W.	DEBBIE	7570	3
857	Media	Neal R.E.	BOB	7219	3
857	Media	Pearson D.F.	DAN	7251	3
857	Media	Powell T.W.	TERESA	7436	3
857	Media	Redding P	PHYLLIS	7259	3
857	Media	Rodgers P.K.	PHYLLIS	7252	3
857	Media	Sisk P.V.	PHYLLIS	7300	3
857	Media	Smith V.P.	CILE	6716	3
857	Media	Sterling C.J.	CAROL	7481	5
857	Media	Stone C.L.	CHERYL	7906	3
857	Media	Styers M.S.	MARGARET	7905	3
857	Media	Thomas N.L.	NANCY	7254	3

51846 7207

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
857	Media	Tilley D.B.	DEBBIE	7255	3
857	Media	Troutman G.A.	GERALD	7489	3
857	Media	Wall S.S.	SUE	7517	3
857	Media	Williard J.M.	JOAN	7261	3
857	Media	Zimmerman S.K.	SUE	7262	3
82	Sports Marketing	Bowling J.S.	JIM	2630	13-PL
82	Sports Marketing	Byrd M.J.	JEFF	6496	13-PL
82	Sports Marketing	Byrd P.L.	LYNN	6465	13-PL
82	Sports Marketing	Chapel R.K.	RANDY	7994	13-PL
82	Sports Marketing	Crews B.C.	BEVERLY	6472	13-PL
82	Sports Marketing	Dawson L. G.	LISA	7689	13-PL
82	Sports Marketing	Dawson R.D.	DENNIS	6928	13-PL
82	Sports Marketing	Drew C.G.	CHRIS	2514	13-PL
82	Sports Marketing	Felts G. G.	GREG	6482	13-PL
82	Sports Marketing	Foreman J.S.	JIM	6482	13-PL
82	Sports Marketing	Freidinger M.W.	MARK	6491	13-PL
82	Sports Marketing	Gohn J.J.	JOE	7547	13-PL
82	Sports Marketing	Gray C.A.	CURTIS	6489	13-PL
82	Sports Marketing	Groce B. C.	BRIAN	6482	13-PL
82	Sports Marketing	Habegger R.W.	RICH	2016	13-PL
82	Sports Marketing	Haney L.D.	LARRY	6672	13-PL
82	Sports Marketing	Harvey C.B.	CHARLOTTE	7690	13-PL
82	Sports Marketing	Hauser R.N.	RICK	6486	13-PL
82	Sports Marketing	Henley D.S.	DAN	6478	13-PL
82	Sports Marketing	Hobbs W.D. Jr.	DAVID	2040	13-PL
82	Sports Marketing	Holder J.A.Jr.	JIMMY	6488	13-PL
82	Sports Marketing	Jarvis S.N.	SANDY	6483	13-PL
82	Sports Marketing	Jones A.K.	ANN	4768	13-PL
82	Sports Marketing	Kiger L.B.	LARRY	7993	13-PL
82	Sports Marketing	Littell G.L.	GREG	2005	13-PL
82	Sports Marketing	Lynch W.G. Jr.	GRANT	6493	13-PL
82	Sports Marketing	Mason M.N.	MARIE	4923	13-PL
82	Sports Marketing	Masten R.P.	BOB	6481	13-PL
82	Sports Marketing	McLenaghan S.A.	SHEILA	4834	13-PL
82	Sports Marketing	Merritt E.B.	LYN	2127	13-PL
82	Sports Marketing	Morgan M.G.	GUY	4753	13-PL
82	Sports Marketing	Norris T.Y.	TY	7638	13-PL
82	Sports Marketing	Paszkowski B.L.	BEVERLY	6393	13-PL
82	Sports Marketing	Pennington B.D.	BETTY	6479	13-PL
82	Sports Marketing	Pierce B.C.	BRYAN	6482	13-PL
82	Sports Marketing	Powell B.J.	JOHN	7225	13-PL
82	Sports Marketing	Powell R.C.	CHRIS	5297	13-PL

51846 7203

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Dept	DEPARTMENT	NAME	CALL NAME	PHONE	FLOOR LOCA.
82	Sports Marketing	Prillaman L.F.	LARRY	2907	13-PL
82	Sports Marketing	Reaves M.H.	MARK	4730	13-PL
82	Sports Marketing	Robertson T.W.	WAYNE	2050	13-PL
82	Sports Marketing	Rogers S.E.	SEAN	5159	13-PL
82	Sports Marketing	Roggenkamp J.B.	JOAN	2105	13-PL
82	Sports Marketing	Roth P.G.	PETER	4747	13-PL
82	Sports Marketing	Seagraves C.W.	COLBERT	6485	13-PL
82	Sports Marketing	Seagraves M.M.	MARY	1485	13-PL
82	Sports Marketing	Shupe M. R.	ROBIN	6482	13-PL
82	Sports Marketing	Smith J.W.	JEANNETTE	2109	13-PL
82	Sports Marketing	Smith M.L.	MARTHA	2126	13-PL
82	Sports Marketing	Snyder L.D. Jr.	LINDSAY	6480	13-PL
82	Sports Marketing	Tucker S.W.	STEVE	7340	13-PL

51846 7209

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Handling Claims

The PC will receive documents or phone calls from time to time relating to various claims. These claims, in most cases, have to do with personnel matters and should be IMMEDIATELY faxed to the appropriate contact person listed below:

Claim	Contact person	Dept/Ph #
Discrimination	Paul Macksood Stan Driskell	Sales Personnel (919) 741-6846 (919) 741-3680
Unemployment	Becky Weeden	Employment Practices (919) 741-6802
Worker's Compensation	Stan Driskell Debi Cutright	Sales Personnel (919) 741-3680 (919) 741-6313
General Liability*	Mike Johnson	Legal (919) 741-7805

* Personal injury or property damage

Voice Mail

Voice Mail is a system which allows employees within the Region to communicate with other employees in the Region. The Company has selected InfoMail to supply RJR with Voice Mail technology.

❖ *Note:* Voice Mail systems should replace the sending of Handheld messages.

InfoMail has many benefits to the Operations Unit:

- Faster turnaround time than Handheld messages
- Strategy changes can be communicated to the entire Region or Division in one message which guarantees employees get the same information, the same way
- Allows for an immediate response to be sent back to an individual who sent you a message.
- Allows for the sender of a message to see if it was picked up by the recipient
- Allows Sales Reps to communicate with each other and the Operations Unit to get or give information on chains, bill-throughs, line numbers, etc.

Using InfoMail

- If a question or request arises, dial (919) 741-6840 to access the InfoMail Help Line. Leave name, number, and a brief message. The call will be returned as soon as possible.

51846 7210

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- The PC should distribute an InfoMail Mailbox ID list of all Region employees to field sales personnel in the Region. This list, similar to the example found inRegion Setup (Book I), lists IDs for all persons.

When you first call InfoMail (800) 835-3824

Before you can access any InfoMail features, you must go through the On-line Tutorial which requires you to:

- set a 5-8 digit password
- record your name and mailbox ID

To begin the Tutorial, dial in to InfoMail (800) 835-3824. Next, dial your default password and press #. Dial your mailbox ID number and press #. You will hear a welcome message and a brief orientation on how InfoMail works.

Following are instructions for completing the On-line Tutorial.

InfoMail On-line Tutorial

- Setting your password. When the tutorial prompts you to set your password:
  - Press [1] to change your Password
  - Dial your new password (any 5-8 digits) and press [#].
  - DO NOT USE YOUR E-MAIL BOX ID NUMBER AS YOUR PASSWORD. THEY MUST NOT MATCH.
- Recording Your Name - When the Tutorial prompts you to record your name:
  - Press [5].
  - Record your name and mailbox ID after the beep.
  - Press [#] when you are finished recording.
- Establish Regular Greeting - Refer to the InfoMail Main Menu, option 4, for information on recording your regular greeting.

Quick Reference Summary

- To access the InfoMail Help Line, call (919) 741-6840
- To access InfoMail toll-free, dial 1-800-TELETAG (1-800-835-3824).
- To back up one step in any procedures, press *.
- To exit any procedures, press * repeatedly until you exit InfoMail.
- When playing back a message, press [4] to repeat the message.

51846 7211

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- When leaving a message, press [5] to by-pass the greeting and access the tone.
- Any recorded message must be at least 3 seconds in length to be accepted by InfoMail.
- Press [0][0] for help or detailed instructions.
- Press [*] to deliver as a regular message.
- Press [1] to deliver as a private message.
- Press [4] to deliver as an urgent message.
- Press [*] to cancel.erase the message.

InfoMail Main Menu

When you dial into InfoMail, you will access the InfoMail Main Menu. This Menu is actually a recording that explains the following 5 options:

- Review - options for reviewing messages (such as Reply, Erase, and Save)
- Send - options for addressing, recording and delivering messages
- Personal Profile - options for setting your password.
- Greetings - options for personalizing your greeting.
- Groups - options for creating/modifying a personal distribution list (InfoMail Group)

To access the InfoMail Main Menu:

- Dial into InfoMail 1-800-835-3824.
- Enter your password and press [#].
- Enter your InfoMail box ID and press [#].
- Press the number of a Main Menu option (1-5)

1 Review Messages

- Listening to Messages - You can review the messages in your voice mailbox by pressing [1] anytime the Main Menu is playing. Your messages will continue to play until you have heard and responded to each one.

Each message comes with an "envelope." An envelope can include the type of message (urgent or private), the sender's name, and the delivery time and date. InfoMail always plays the envelope of a message before playing the message itself.

51846 7212

- Responding to Messages - After you hear each of the messages in your mailbox, InfoMail will ask you to select one or more responses from the Response Options Menu.
  - Press [1] to reply directly to a message from another InfoMail user
  - Press [2] to erase the message
  - Press [3] to save the message for later review
  - Press [4] to repeat the message
  - Press [*] at any time to stop reviewing messages and return to the Main Menu
- Other Helpful Options - These options are useful when playing back messages:
  - Press [7] to back up 10 seconds in a message
  - Press [7] [7] to back up to the start of a message
  - Press [8] to pause for 20 seconds
  - Press [8] [8] to resume if paused
  - Press [9] to jump ahead 10 seconds
  - Press [9] [9] to jump to the end of a message
  - Press [#] to skip to the next message

2 Send Messages

1. Press [2] at the Main Menu to send messages to other people's mailboxes.
2. Dial the mailbox ID number and press [#].
3. Press [5] to begin recording. The message must be at least 3 seconds in length.
4. When you are finished recording, specify a delivery option.
   - Press [#] to deliver as a regular message
   - Press [1] to deliver as a private message
   - Press [4] to deliver as an urgent message
   - Press [*] to cancel/erase the message

51846 7213

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3 **Change Password**

1. Press [3] at the Main Menu to select Personal Profile.

- Press [1] at the Personal Profile Menu to select Change Password.
- Dial your new password (any 5-8 digits) and press [#].
- InfoMail will speak the new password.
- Press [#] to confirm it, or press [*] to cancel it and enter another password.
- Press [*] to cancel it and enter another password.

4 **Names and Greetings**

■ Recorded Names - Your recorded name is part of what people hear when they call you and your line is busy, or address an InfoMail message to you:

To review and change your recorded name:

- Press [4] at the Main Menu to select Record Name and Greeting.
- Press [1] at the Greetings Menu to select Name.
- InfoMail will play your current Recorded Name.
- Press [#] to accept it and return to the Greeting Menu or
- Press [5] to begin recording a new name. Begin speaking after the beep.
- Press [#] to end recording.

5 **Groups**

■ Groups are lists of other InfoMail subscribers that you may need to send messages to on a regular basis. Once you set up a group, you can send a message to all members of the group with a single keypress.

Creating a Group:

1. Press [5] at the Main Menu to select Groups.
2. Press [1] at the Groups Menu to select Create a New Group.
3. Dial a New Group number (1-8) and press [#].

51846 7214

4. InfoMail will repeat the number and take you to the Group Edit Menu.
5. Press [1] to add group members:
   - Dial the mailbox ID (address) to be added
   - InfoMail will repeat the name or number
   - Press [#] to add the number to the group or press [*] to cancel.
   - Repeat these steps until all mailbox addresses have been added (up to 24)
   - Press [#] to end addressing.
6. Press [2] to record a Group Title.
7. Press [5] to begin recording.
8. Press [#] to end recording.

51846 7215

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 5
Travel Arragements

51846 7216

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

TRAVEL ARRANGEMENTS

The PC can handle all travel arrangements for Region personnel, including hotel reservations, air travel and rental cars. **DO NOT UTILIZE THIS SERVICE TO ARRANGE VACATIONS OR OTHER PERSONAL TRIPS.**

Preliminary Activities

Each manager in the Region should fill out a travel profile for American Express Business Travel. This company handles all travel arrangements and needs information specific to each manager. At this point, most managers already have profiles. For those who do not or for newly promoted managers, a profile should be filled out and forwarded to American Express Business Travel. A sample form is included at the end of this section.

When air travel is not required, it is often more convenient for the PC to call specific hotels for reservations. However, American Express will handle these tasks as well, if requested.

Utilizing American Express Business Travel

1. A request for travel arrangements will be made by RJR managers.
2. The PC should make arrangements with American Express Business Travel. To do this:
   - Have details of request available
   - Call American Express Business Travel at 1-800-227-5902
   - Identify company, managers' name, and state where Travel profile resides
   - Communicate travel details:
     - origination/departure dates and preferred times
     - origination/departure locations
     - any special requests
3. American Express personnel will verify information and secure any reservations, tickets, automobile rentals, etc. Utilize the Trip Record to record final travel arrangements. A sample form is included at the end of this section.
4. Once arrangements have been completed, communicate to the manager via InfoMail or fax copy of the Trip Record.
5. American Express will ensure any tickets or travel agenda's are sent to the location requested. If request entails sending travel materials to the Operations Unit, the PC should expedite their forwarding to the appropriate personnel when received.

51846 7217

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Making Travel Arrangements Directly With Hotels

As previously stated it is often quicker and more convenient to make non-air travel arrangements directly.

The PC should gather the American Express Card Number of each manager in the Region. These numbers will be necessary when holding hotel reservations when made directly. If needed, a copy of each Manager's Travel Profile can be retained at the Operation Unit for review.

1. Request for arrangements is made by RJR Management.

2. PC should place call to make reservation, per management instruction.

51846 7218

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PLEASE COMPLETE AND RETURN TO:

TRAVEL SERVICES
11 PLAZA

AMERICAN EXPRESS• BUSINESS TRAVEL SERVICE

You can count on us to make your next business trip run as smoothly as possible.

ENROLLMENT PROFILE

TRAVELER INFORMATION

Name ______________________ Title ______________________

Company name ______________________ Division/Dept ______________________

Employee ID # ________ Dept.# Work phone # ( ) ________ Home phone # ( ) ________

Ticket delivery address Bldg., floor, etc.

Charge my business travel to Card name ________ Number ________ Exp date ________

Guarantee my hotel reservation to (if different from above) Card name ________ Number ________ Exp date ________

Signature X ______________________ Date ________

TRAVELER PREFERENCES

The following information enables us to individually customize your travel arrangements. Providing us with this information now will save you time later on—every time you book a business trip in the future.

Airline seating preference ☐ Aisle ☐ Window ☐ Smoking ☐ Non smoking Special meal requests ________

FREQUENT FLYER CLUB MEMBERSHIPS		HOTEL/CAR CLUB MEMBERSHIPS	
Airline	ID #	Company	ID #
Airline	ID #	Company	ID #
Airline	ID #	Company	ID #
Airline	ID #	Company	ID #
Airline	ID #	Company	ID #
Airline	ID #	Hotel room preference ☐ Smoking ☐ Non-smoking	

Travel Arranger/Secretary ______________________ Phone # ________

51846 7219

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

TRIP RECORD for date

Planning Notes:

TRAVEL COUNSELOR	PASSENGER(S)

AIR TRAVEL

Date	From	To	Depart Time	Arr. Time	Airline	Flight No.

ACCOMMODATIONS

Hotel	City	Arrival Date	Departure Date	No. Nights
Alternate				

CAR RENTAL

Company	Type	Pick Up City/Date	Drop Off City/Date	Days

SPECIAL SERVICES

Visa, Passport, Renewal, Limousine, Etc.

TICKET DELIVERY

DATE TIME

Reservation Notes:

Fares Status Special Meals Seats Assignments Cancellation #s Etc

51846 7220

We're very big on personal attention℠

AMERICAN EXPRESS Business Travel Service

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 6
Meeting Arrangements

51846 7221

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MEETING ARRANGEMENTS

As necessary, the PC can make arrangements for Division or Region meetings.

Preliminary Activities

The PC should obtain a list from each Division, District, Chain, or Region Manager noting preferred meeting locations. This list should be prioritized and also indicate:

- Contact name and phone number
- Any special arrangements (for example, a hotel may give a free meeting room if attendees are staying at the hotel)
- Any special rates applicable

Making Meeting Arrangements

1. RJR Management will forward details of meeting to the PC, either orally or in writing.
2. The PC refers to instructions or prioritized location list, to determine where meeting is to be held.
3. The PC calls meeting location and arranges event. The PC should be prepared to supply the following information:
   - Table/chair arrangement for meeting room
   - Number of attendees
   - Refreshments or snacks needed and when
   - Any additional items needed (i.e, overhead screens, VCRs, flipcharts, notepads, pens/pencils, ashtray, coat racks, etc.)
   - Lunch arrangements, if necessary
   - Names of persons staying at hotel (make reservations)
4. Once arrangements have been made and locked in, the PC should communicate necessary information to affected RJR personnel. InfoMail may be used, but letters are more appropriate if the volume of information to be passed on is large. Information to be communicated to RJR personnel should include:
   - Dates, locations and times
   - Meeting attire
   - Subject of meeting
   - Items to bring to meeting, if necessary
5. If certain items are to be brought from Division/Region/Operations Unit Offices (such as Eiki Vision, overhead projector, etc.) the PC must communicate with personnel who should pick up and bring item.

Making Meeting Books

Some meetings will require the setup of meeting books for each attendee. When books are required, a set of contents is forwarded to the PC by the manager and is duplicated in the quantity requested by that manager. In these cases, nothing can replace the "collate" button on the Operations Unit copying machine.

51846 7222

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7223

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 7
Correspondence

51846 7224

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

The Personal & Administration Coordinator must ensure that all correspondence is distributed, sent and filed in a timely manner. The volume of mail in an Operations Unit can be immense; as a result, it is crucial that proper steps are taken to ensure good organization of this task. The PC is responsible for each of the following areas:

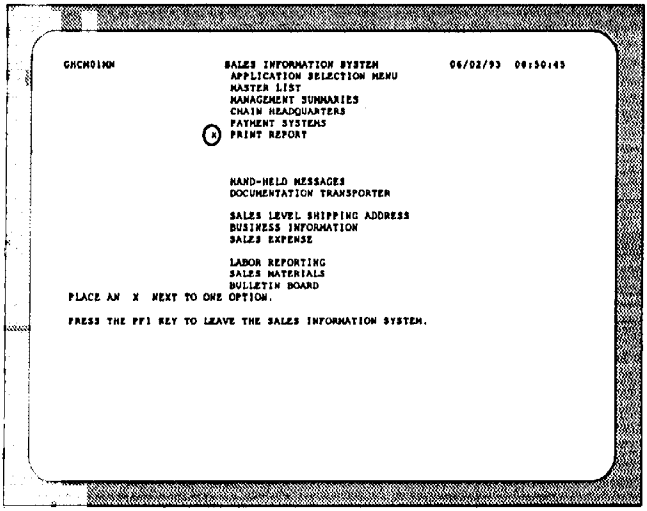
- Mail
- DTs
- E-Mail
- Faxes

Preliminary Procedures

- As indicated in the Region Setup procedures (Book I), an efficient mailroom must be in place. This mailroom should be arranged with stackable mail "slots" with each sales rep's name assigned a slot. Additionally, each Division and Chain Division in the Region should also have a mail slot.

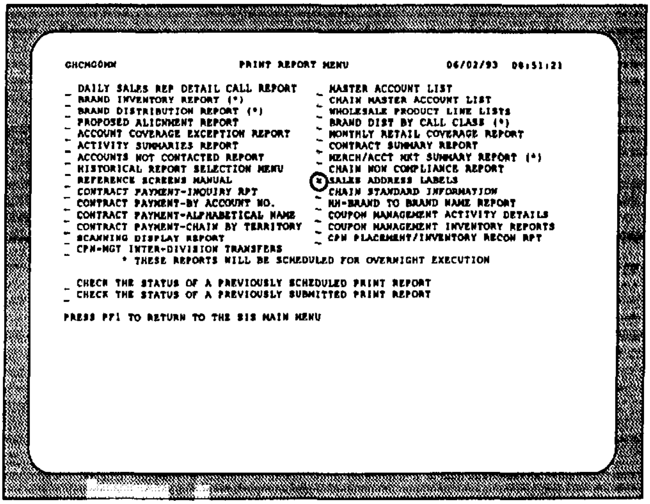
- A packet of each sales rep/managers' address shipping labels should be in each slot. These labels can be obtained as follows:

1. Select PRINT REPORT from the SIS Main Menu and press [ENTER].



51846 7225

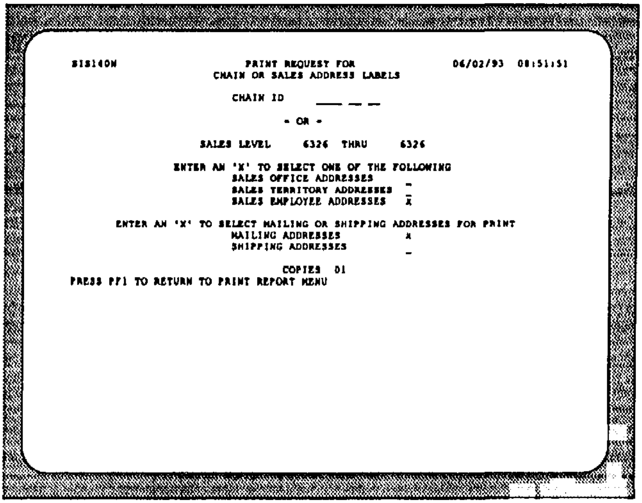
2. Select SALES ADDRESS LABEL from the Print Report Menu and press [ENTER].



51846 7226

 © R.J. Reynolds Tobacco Company 1993

3. This screen allows for a variety of selections. For the purposes of choosing labels for mailings to sales personnel, type "X" next to SALES EMPLOYEE ADDRESSES and MAILING ADDRESSES to request a list of all employees listed within this operating unit.



```
BIS140N              PRINT REQUEST FOR              06/02/93  08:51:51
                CHAIN OR SALES ADDRESS LABELS

                  CHAIN ID     ____ __ __

                          - OR -

              SALES LEVEL    6326  THRU    6326

           ENTER AN 'X' TO SELECT ONE OF THE FOLLOWING
                  SALES OFFICE ADDRESSES       _
                  SALES TERRITORY ADDRESSES    _
                  SALES EMPLOYEE ADDRESSES     X

     ENTER AN 'X' TO SELECT MAILING OR SHIPPING ADDRESSES FOR PRINT
                  MAILING ADDRESSES            X
                  SHIPPING ADDRESSES           _

                         COPIES  01
PRESS PF1 TO RETURN TO PRINT REPORT MENU
```

Also required is the number of labels needed. Type the quantity desired at the COPIES prompt.

- *Note:* The number of individual labels needed must be input — not the number of sheets of labels.

Once all information has been entered, press [ENTER] to continue.

51846 7227

4. A list of all employees within the operating unit is displayed. Select any or all employees within the operating unit. Select any or all employees by typing "X" next to their name. Once all selections have been made, press [PF2] to process. Adhesive labels will be sent from Winston-Salem once this takes place. Allow approximately one week for delivery.

```
S1S143N              SELECTED SALES ADDRESSES           06/02/93  08:52:39

ENTER AN 'X' BESIDE EACH LOCATION FOR LABEL PRINT

        FLAG    AREA         NAME
         _      6326    D SMILDEN
         _      6326    THEODORE ANDERSON
         _      6326    VIRJEAN LINDGREN
         _      6326    THOMAS GOUDREAULT
         _      6326    HAROLD HUGHESDON
         _      6326    BRIAN HAMILTON
         _      6326    JOSEPH ADEMINO
         _      6326    JAY LURO
         _      6326    WADE OMAN
         _      6326    AMY FARNUM
         _      6326    SALLY ONISKIN
         _      6326    MICHAEL ENGEL

ENTER AN 'X' TO PRINT LABELS FOR ALL LOCATIONS  _
PRESS PF1 TO RETURN TO THE REPORT PRINT MENU
PRESS PF2 TO PRINT SELECTED LABELS
```

Sorting Incoming Mail

1. Once received each day, the PC should, before opening, arrange all incoming mail into separate piles. These stacks should be broken out based on the Addressee's name or operating unit.

2. Once all mail has been separated, the PC should open and review all articles in each pile:

   - Each item is reviewed for content to determine to whom, the correspondence should be forwarded.
   - To expedite processing and better organize distribution, each article should be placed in the slot of the person to whom the correspondence is to be forwarded, as each letter is opened.
   - Certain items need to be retained in Operations Unit General Files. See General Mail file section for details.

51846 7228

 © R.J. Reynolds Tobacco Company 1993

Sending Mail

1. The PC should ensure all mail is sent 1 to 2 times each week. The Region Operations Manager should determine how often mail is to be sent. The objective is to reduce the quantity of unnecessary correspondence being sent to Region personnel.
2. Because each sales rep and managers' mail slots have been continually filled throughout the week, determining what should be sent and to whom is no problem — the process is virtually complete when the PC begins.
3. The PC, beginning with the first slot, should take out all contents of the slot, except for the address labels. This correspondence should be placed in an envelope. Utilize an address label from that mail slot to address the envelope. Complete this process until the contents of all mailslots are sealed in envelopes.
4. Utilize the mail machine to determine postage required for each item, and place postage.
5. Once all envelopes have been stamped with proper postage, the entire stack of outgoing mail can be placed in designated spot for pick-up.

)ocument Transporters (DTs)

This feature enables one Field Office to communicate with another via the Office Computer System.

Receiving Incoming DTs

1. Incoming DTs should be treated like mail. Each document should be forwarded to the mailslot of the parties that should receive it.

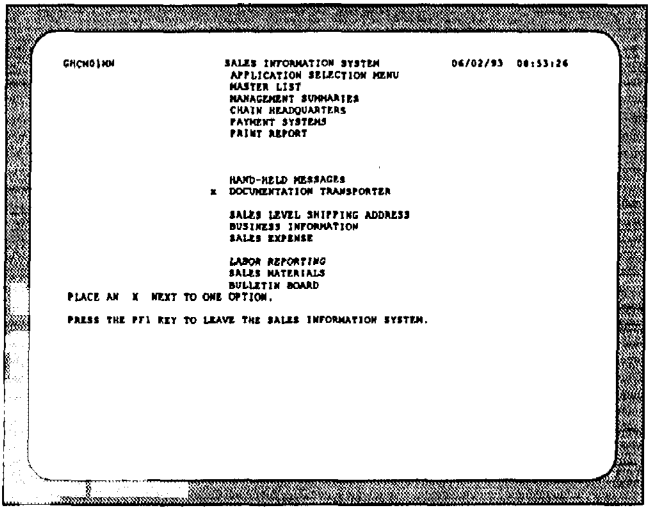
   - *Note:* Certain priority or "hot" DTs may need immediate distribution to affected parties. Consult with Region Operations for Region guidelines regarding when important documents should be distributed.

51846 7229

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Sending DTs

1. Select DOCUMENTATION TRANSPORTER from the SIS Main Menu and press [ENTER].



2. This screen prompts the PC for pertinent address information and title/subject:

   - State the title/subject
   - State sender in space provided. Give Manager's name and office number.
   - Under Send Shipment To, select from these options:
     - National distribution - all offices ($$$$)
     - Sales Area (#$$$) - all offices in Sales Area
     - Sales Region Office (#xxx)
     - Region (##$$) - all offices in Region
     - Region Office (##$$)
     - Division/District (####)
   - Type Operations Unit # at SHIPMENT CONFIRMATION SENT TO prompt

   Once all information is entered, press [ENTER] to type message.

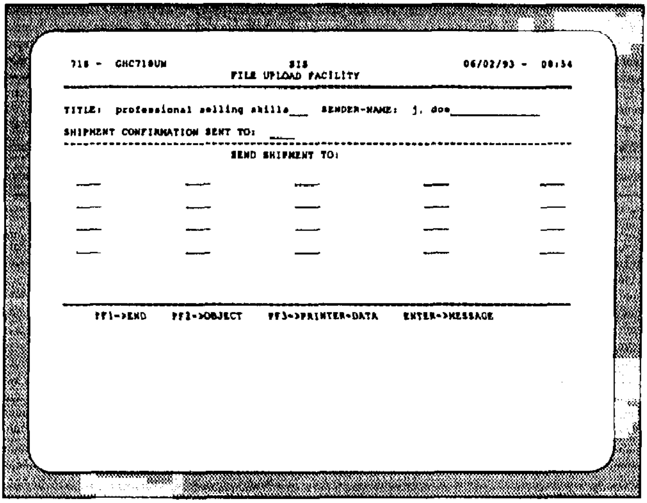
3. At the File Text Facility screen, type in message.

51846 7230

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Press [ENTER] if more space is needed for message.
- Use phrase "To All Division Managers" when sending DT to all managers in the entire country. Use phrase "To Our Division Managers" when corresponding with selected Managers (in this case, list all managers, with office #s, at the beginning of the message)
- Once complete, press [PF1] to transmit the message to parties indicated previously.



4. A confirmation report indicating that the message was sent will print at the printer. Retain per normal filing instruction.

Electronic Mail

Electronic Mail or E-Mail, is being utilized more and more often. Because this option can communicate information directly from Windows Applications, the information can be more complex. Also, using E-Mail allows the receiver to work with and modify the document sent. This mode will be used by most parties sending customized budget reports, long formatted letters, etc.

General Information

- When you access Electronic Mail, you will be using Personal Services/PC (PS/PC). The instructions that follow explain show to use this product.
- Electronic Mail may be used to exchange any type of PC file (i.e., Microsoft Word, Microsoft Excel) between electronic mail users.

51846 7231

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Access electronic mail at least twice daily (morning and afternoon) to receive your incoming mail. It is very frustrating to send mail and the recipient not retrieve it.
- Receive your status weekly. The status document provides information about your electronic mail activity. Review the status to determine who has not received your mail.
- Clean up your file cabinet weekly. The File cabinet contains information about all of your electronic mail activity. An item is created in the file cabinet each time you send or receive electronic mail. This information is stored on your hard disk and takes up needed space. Delete any items that are no longer needed.
- When using PS/PC, you should make your selections with the number, such as "2 send." *By pressing the number, you will not have to press [ENTER].*

For assistance with Electronic Mail problems, please call the RJR Customer Help desk at 800/822-2011.

Accessing Electronic Mail

From the RJR Master Menu:

1. Select ELECTRONIC MAIL. Personal Services/PC will load and the Main Tasks Menu will be displayed.
2. Press [ALT] + [ESC] top access the "a" mainframe session. Verify that the MSG10-RJRT TERMINAL-ID:XXXXXXXX IS NOW IN SESSION screen is in the background. If not, log off any application (SIS, SES, SMS,etc.) until the MSG-10 screen appears. Continue pressing [ALT] + [ESC] until you return to the PS/PC Main Tasks Menu.

Exiting Electronic Mail

There are two methods which may be used to exit Electronic Mail. The first method is to exit Electronic Mail completely. To do this:

From Electronic Mail:

1. Select [F8] to return to the Main Menu.
2. Select [F9] to disconnect from the Host.
3. Select [F10] to exit and return to the RJR Master Menu.
4. From the RJR Master Menu:
   - Press [ALT] + [TAB] to return to the Program Manager, or
   - Press [CTRL] + [ESC] to display the Task List

The second method is to have Electronic Mail running in a window and toggle to another window so you may access either Word or Excel. To do this:

51846 7232

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

From Electronic Mail:

1. Press [CTRL] + [ESC] to display the Windows Task List or press [ALT] +[TAB] to display the Windows Program Manager.

2. Point and double-click on the task you want to access.

Receiving Mail

Electronic mail should be received at least twice daily. These is no notification that mail is waiting to be picked up.

1. Access Electronic Mail from the RJR Main Menu.

   ◆ *Note:* When you receive your mail, it will be stored on the drive/path that you specified in your User Defaults - Disk Paths (receive). The two defaults which may be used are A:\ or C:\DATA\MAIL. If you use A:, be sure to insert a diskette in the A: drive. If you use C:\DATA\MAIL, your mail will be stored in this directory.

2. Select 1 RECEIVE.

3. Select 1 HOST.

   - Communications Link to RJRT will appear in the bottom right corner
   - If there is no incoming mail, the following message appears: **THERE IS NO MAIL FOR YOU TO RECEIVE AT THIS TIME.**

4. Position cursor on the first mail item received.

5. Select option 0 ITEM DESCRIPTION for each new mail item received.

6. Note the PC FILENAME (document name and extension) of the document received (i.e., status.doc, weekly.jsp). To view or print, you must go to WORD or EXCEL. The document will be stored either on the A: drive or in the C:\DATA\MAIL directory.

7. Press [F5] Previous Menu to select next new mail item and repeat steps 5 and 6.

8. Exit Electronic Mail.

9. Access WORD or EXCEL to print document(s).

Printing Mail

All documents or spreadsheets which are received via electronic mail must be printed in Microsoft Word or Excel. A message, note or status document may be printed from electronic mail.

51846 7233

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

To print a document:

1. Go to Word for Windows.

2. Select FILE and OPEN.

3. From Directories:

   - Double-click on appropriate drive (i.e., [-A-] or [-C-].

   - If needed, select directory where document is stored (i.e., C:\DATA\MAIL). To change to another directory, such as C:\DATA\MAIL:

     - Double-click on [..]
     - Double-click on [data]
     - Double-click on [mail]

4. Choose the file you want to open. If document has a file extension other than DOC, you must type the appropriate file extension in OPEN FILE NAME or use a wildcard (*).

   Examples:

   Open File Name: [A:*.001] - a list of documents with .001 extension will display

   [A:*.*] - all documents will display

5. When file is open, print the document.

Sending a Document

To send a Microsoft Word document, an Excel spreadsheet, or any other PC file to another user, follow these instructions:

1. Create your document in Microsoft Word or Excel; save and close the document.

2. Access Electronic Mail.

3. From the PS/PC Main Tasks Menu, select 2 SEND.

4. Select 1 DOCUMENT.

5. From the SEND DOCUMENT menu, complete the following:

   PC Filename: document name (i.e., plan.doc)
   Doctype: PVT
   Drive/Path: A: or C:\DATA\WORD

51846 7234

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Note: The Drive/Path field on this screen will show the default defined in USER DEFAULTS - DISK PATHS (SEND). Most of the documents you create in Microsoft Word will be stored on either the A: drive or the C:\DATA\WORD directory. If the file you want to send is not located on A: or C:\DATA\WORD, change the drive/path to show where the file is located.

6. Press [ENTER] when completed. The ADDRESS HOST MAIL menu will be displayed.

Addressing Mail

You can address your mail using any combination of two ways: (1) type individual User ID/Address or (2) copy distribution lists.

To address mail to individual User IDs/Addresses:

From the ADDRESS HOST MAIL menu:

1. Press [ENTER] or select 1 ADD/CHANGE to address mail.
2. Under SEND TO, type the USER ID. Example: 4000.
3. Press [TAB].
4. Under ADDRESS, type RJRT.
5. Press [ENTER] when completed. You can address your mail to a maximum of 100 recipients.
6. Select 2 SEND.

To address mail using distribution lists:

From the ADDRESS HOST MAIL menu:

1. Select 4 LIST NAMES.
2. Highlight the distribution list you want to copy and press [ENTER]. The list will be copied back to the previous panel.
3. Repeat step 2 until all distribution lists have been copied. REMINDER: You can send your mail to a maximum of 100 recipients.
4. When you finish, press [F5] to return to the previous panel, where the names in each list will appear.
5. Select 2 SEND.
   - "Wait" will flash in upper right corner.

51846 7235

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- *Note:* If "wait" continues to flash for more than 5 minutes, the host has encountered a problem. You should press [F9] to disconnect and call the Help Desk for assistance.

- "Communications Link to RJRT" will appear in the bottom right corner.

Status

The host status document provides information about your electronic mail activity. Status needs to be retrieved weekly since it shows whether electronic mail you have distributed has been picked up.

When you receive a status, you will receive a document entitled DISTINFO. This document consists of four sections:

- Document is to be delivered to your User ID
- Status of distributions (delivered, scheduled to be delivered, invalid recipient, etc)
- Status of error messages which occurred
- Number of documents distributed

- *Note: When you receive your status, it will be stored on the drive/path that you specified in your "User Defaults - Disk Paths (Receive)."* The two defaults which may be used are A:\ or C:\DATA\MAIL. If you use A:, be sure to insert a diskette in the A: drive. If you use C:\DATA\MAIL, your status will be stored in this directory.

1. From the PS/PC Main Tasks Menu, select 1 RECEIVE.

2. Select 2 STATUS.

3. Select option 1 VIEW.

4. Review the host status document.

   - To move through the document, use the arrow keys or the pageup/page down keys.

   - The "Status of Distribution Specified for Acknowledge Delivery" section will show the status of electronic mail which you have distributed.

   - If the status shows SCHEDULED, the mail has not been picked up by the recipient. You may need to notify that person that mail is waiting for them the receive.

   - If the status shows DELIVERED, the mail has been picked up by the recipient.

5. Press [PF5] PREVIOUS.

6. The document may be deleted after reviewing. To delete:
   - Select B DELETE.

51846 7236

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Select 3 BOTH to delete the file cabinet item and the document.

File Cabinet

The file cabinet is a central location where a record of your electronic mail activity is maintained. Each time you send or receive mail, an item is noted in the file cabinet. Since this information is stored on the hard disk, you need to delete items on a weekly basis.

From the PS/PC Main Tasks Menu:

1. Select 5 FILE CABINET.
2. Select 1 REVIEW to review the file cabinet items. You will see an item for all mail with an associated Tag. Some of the tags used are:
   - Mail which has been sent Tag = SEND
   - Mail which has been received Tag = NEWMAIL
   - Status document received Tag = STATUS

To delete an item from the File Cabinet

3. Highlight the item to be deleted. To view details concerning this item, select 0 ITEM DESCRIPTION.
4. Select option 8 DELETE. The message box requests which type of delete you want to perform:

   1 ITEM - deletes file cabinet item
   2 DOCUMENT - deletes document file from disk
   3 BOTH - deletes item and document

5. Select 1 ITEM. The item will be deleted.

   ◆ *Note:* This is the preferred method to use when "cleaning up" the file cabinet. By deleting only the item, you will not delete a document which you need to keep.

To delete an item and the document

◆ *Note:* To delete a document, you must insert the diskette in drive A: which contains the document you want to delete. If the document is stored on C:\DATA\MAIL or C:\DATA\WORD, the system will locate the file.

1. Select 3 BOTH. The item and document will be deleted.

   IMPORTANT: Be careful when deleting documents; do not delete documents you may need.

51846 7237

Distribution Lists

Distribution lists are an easy way to address mail to a group of people who use electronic mail. For example, you could create a distribution list for one chain account and name it FOODLION. Then, when sending mail to that chain, you could use FOODLION instead of each person's user ID and address. A distribution list can contain entries for up to 50 people. You can define as many of as 50 distribution lists. Each one must have a unique name.

To create a Distribution List:

1. Select 6 DIRECTORY.
2. Select 2 DISTRIBUTION LISTS.
3. Select option 2 CREATE LIST.
4. Select option 2 ADD.
5. Type the following information. Press [TAB] to move between fields.

   LIST NAME

   Name of the distribution list. Name can be up to 8 characters.

   DESCRIPTION:

   Brief description of list. Can be up to 30 characters.

6. Under USER'S NAME type the full name of the user you are creating the entry for. This field is optional. The only time this "full name" will show up is when using Note.
7. Under USER ID, type the person's electronic mail User ID.
8. Under ADDRESS, type RJRT.
9. Move the cursor to the next line and repeat steps 6-8 to add other entries.
10. When finished, press [ENTER].
11. Select option 1 SAVE LIST.
12. Press [PF8] Main.

To edit a Distribution List

1. Select 6 DIRECTORY.
2. Select 2 DISTRIBUTION LISTS.

51846 7238

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. Select option 1 EDIT LIST.
4. Select option 3 CHANGE.
5. Make additions or changes and then press [ENTER].
6. Select option 1 SAVE LIST.
7. Press [F8] Main.

To delete a Distribution List

1. Select 6 DIRECTORY.
2. Select 2 DISTRIBUTION LISTS.
3. Move the arrow keys to the distribution list you want to delete.
4. Select option 3 DELETE LIST. You will be asked if you are sure that you want to delete list.
5. Select option 1 YES. The distribution list will be deleted.
6. Press [F8] Main.

Sending a Message

The message function is used when you need to send a short message to another user. The message text can only be 256 characters (four lines). To send a message:

1. Select 1 SEND.
2. Select 2 MESSAGE.
3. Type the text of the message. The editor does not word wrap but will return you to the next line.
4. Press [ENTER] when completed.
5. Address the mail.

Sending a Note

The "note" function is used when you need to send a message longer than 4 lines. Notes can be up to 600 lines (about 10 pages). However, if you plan to create a lengthy note, you will want to use WORD.

1. Select 3 NOTE or select 2 SEND and 4 NOTE.
2. Complete the following field as needed:

   TO: UserID (space) RJRT or Distribution List Name

51846 7239

CC: UserID (space) RJRT or Distribution List Name
SUBJECT: Subject of note
REFERENCE: Reference information, if needed (i.e., previous note, meeting, etc.)

- *Note:* If you are entering only one address line (TO or CC fields), press [ENTER] to move to the next field. If you need to add another address line, highlight the TO field and press [F9]. (ADD LINE).

3. Type the text of your note.

4. Press [F2] END.

5. Select 1 SEND AND FILE. (Send note and file in file cabinet).

Electronic Mail Directory

An on-line user directory is available from the Host for users of the RJRT electronic mail system. To access this directory.

From the Personal services/PC (Electronic Mail) menu:

1. Confirm that you are disconnected from the host. "Communications Link to None" should appear. If not, press [F9] to disconnect.

2. Press [ALT] + [ESC]. The MSG10 - RJRT TERMINAL XXXXX IS NOW IN SESSION screen will be displayed.
3. From the MSG10.. screen:

   - Type: CICSP05 and press [ENTER].
   - Press Clear Screen (pause)
   - Type DIR and press [ENTER]. The User Selection panel will display.

4. Press [TAB] to the UserID Field.

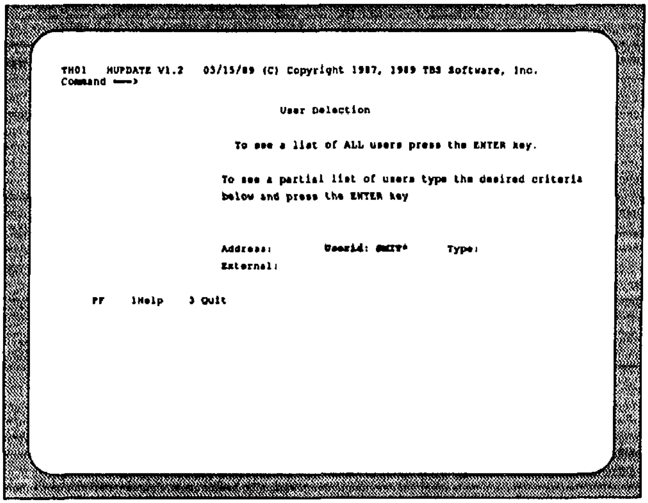
5. Type the first 2-4 characters of the last name and an asterisk (example SMIT*) and press [ENTER].

   - *Note:* You can select by matching a complete string such as SMITHJ or a generic value using the "*" wildcard character. For example, typing "SMIT*" in the User ID field will select all users whose User ID begins with "SMIT", such as SMITHB, SMITHC, etc. By using the wildcard symbol (*), you will help limit your search , If you press [ENTER] without providing any criteria, you will get a list of all users. A maximum of 250 users can be displayed during the search.

51846 7240

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

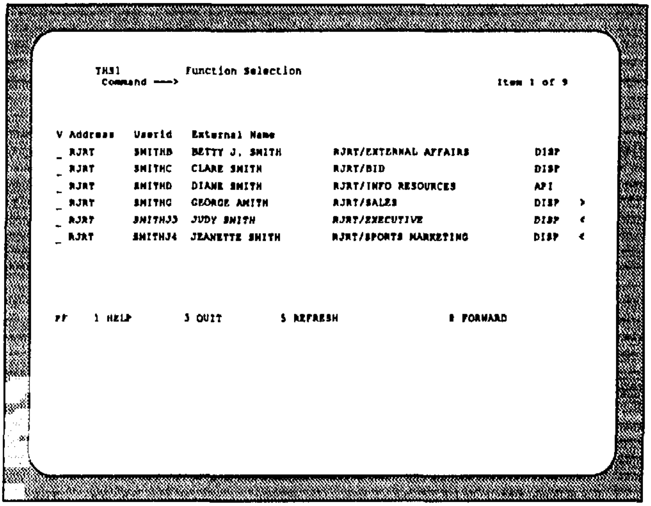


You will now see the list of users that match your selection criteria. A listing of Address, User ID , Full Name and Department will display. Press [F8] to scroll forward and [F7] to scroll backward through the list.

51846 7241

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. Locate the appropriate User ID. Electronic mail user ID's consist of up to 6 characters of the last name and first initial. A number is used to identify users with the same name. The ADDRESS and USER ID fields are used when sending electronic mail.



THS1 Function Selection
Command ---> Item 1 of 9

V	Address	Userid	External Name			
_	RJRT	SMITHB	BETTY J. SMITH	RJRT/EXTERNAL AFFAIRS	DISP	
_	RJRT	SMITHC	CLARE SMITH	RJRT/BID	DISP	
_	RJRT	SMITHD	DIANE SMITH	RJRT/INFO RESOURCES	API	
_	RJRT	SMITHG	GEORGE AMITH	RJRT/SALES	DISP	>
_	RJRT	SMITHJ3	JUDY SMITH	RJRT/EXECUTIVE	DISP	<
_	RJRT	SMITHJ4	JEANETTE SMITH	RJRT/SPORTS MARKETING	DISP	<

PF 1 HELP 3 QUIT 5 REFRESH 8 FORWARD

7. To make another selection, press [F3] QUIT to return to the USER SELECTION menu. The QUIT key is also available in all panels. Pressing [QUIT] returns you to the previous panel.

8. To exit:

- Press [F3] QUIT until you see the UPDATE Transaction Ended message.
- Press clear screen.
- Type CESF LOGOFF. The MSG10... screen will be displayed.
- Press [ALT] + [ESC] until you return to the PS/PC Main Tasks Menu.

51846 7242

 © R.J. Reynolds Tobacco Company 1993

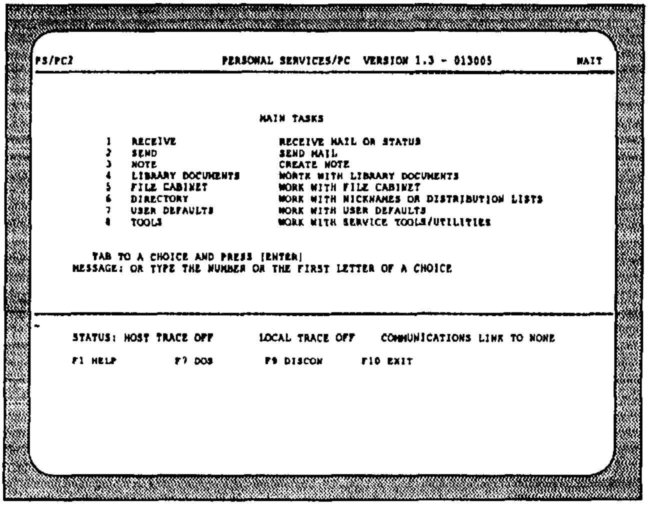
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Electronic Mail User Defaults

Before using Electronic Mail, your user defaults must be correctly defined. These instructions show the menu you would have displayed and the commands to complete your defaults. If you have a problem or need assistance, please call the Customer Help Desk (919) 741-5713. Please follow these instructions to set up your defaults.

1 - Disk Paths

1. From the RJR Master Menu, select ELECTRONIC MAIL.



51846 7243

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. From the MAIN TASKS Menu, select 10 USER DEFAULTS.

```
PS/PC  5                    USER DEFAULTS                           WAIT
------------------------------------------------------------------------


          1 DISK PATHS          DISK DEFAULTS
          2 PERSONAL            YOUR ID, PASSWORD, METHODS OF OPERATION
          3 ATTACHMENT          HOST ATTACHMENT TYPE
          4 COMMUNICATIONS      FOR ASYNCHRONOUS COMMUNICATIONS AND 3270-PC
          5 LOGON               HOST LOGON/LOGOFF INFORMATION
          6 INTERFACE           APPLICATION PROGRAMS
          7 BYPASS              PANEL BYPASS DEFAULTS
          8 HOST PASSWORD       CHANGE YOUR HOST PASSWORD


         TAB TO A CHOICE AND PRESS [ENTER]
      MESSAGE: OR TYPE THE NUMBER OR THE FIRST LETTER OF A CHOICE


------------------------------------------------------------------------
 STATUS: HOST TRACE OFF      LOCAL TRACE OFF    COMMUNICATIONS LINK TO NONE
   F1  HELP      F5 PREVIOUS      F7 DOS   F8 MAIN   F9 DISCON
```

51846 7244

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. From the USER DEFAULTS menu, select 1 DISK PATHS.

```
PS/PC  5                      DISK DEFAULTS                       WAIT
------------------------------------------------------------------------
        SEND
        DRIVE/PATH---------->        A:\    OR C:\DATA\WORD

        RECEIVE
        DRIVE/PATH---------->        A:\    OR C:\DATA\MAIL

        FILE CABINET
        DRIVE/PATH---------->        C:\PSPC.M\

        LOCALTRACE LOG
        DRIVE/PATH---------->        C:\PSPC.SYS\

        FIND RESULTS
        DRIVE/PATH---------->        C:\PSPC.M\

        MEMORY SWAP
        DRIVE/PATH---------->        C:\PSPCMEM\

        WHERE THE FILE YOU WANT TO SEND CAN BE FOUND
        MESSAGE: MAKE ADDITIONS OR CHANGES, THEN PRESS [ENTER]
------------------------------------------------------------------------
STATUS: HOST TRACE OFF    LOCAL TRACE OFF    COMMUNICATION LINK TO NONE

    1 HELP      F5 PREVIOUS      F7 DOS     F8 MAIN     F9 DISCON
```

4. The DISK DEFAULTS menu will be displayed.

```
GJ1593UN                  SALES MATERIAL SYSTEM                 05/18/93
                            FORM/ITEMS ORDER
                                              ORDER NUMBER: 3143-5809
   TO ORDER - ENTER THE ITEM NUMBER(S) AND THE QUANTITY DESIRED:

 ITEM  QTY        ITEM  QTY        ITEM  QTY        ITEM  QTY        ITEM  QTY
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
 ____  ___        ____  ___        ____  ___        ____  ___        ____  ___
PF1 - RETURN TO PREVIOUS SCREEN\MENU   PA1 - HELP (NON-ENTERED QUANTITIES AND
PF2 - RETURN TO ORDER ENTRY MENU                  ITEMS WILL BE LOST ON RETURN)
PRESS ENTER TO CONTINUE (MAXIMUM ENTRY IS ONE SCREEN)
```

51846 7245

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. From the SEND field, type the appropriate drive/path for this default. Refer to Note 1.

6. Press [TAB].

7. From the RECEIVE field, type the appropriate drive/path for this default. Refer to Note 2.

8. Do not change any of the other defaults on this screen.

9. Press [ENTER] when finished. The USER DEFAULTS Menu will be displayed. Since some Regions/Divisions use the A drive to store documents and some use the C drive (hard disk), these instructions were written for both. You will make your selection according to where you want to store your documents.

NOTE 1: The SEND drive/path default is used when sending a document. This default tells the system where your Word documents are stored. Complete the SEND field with the appropriate drive/path where you store your documents.

Store document on A: drive	Type A:\
Store documents on hard drive	Type C:\DATA\WORD

NOTE 2: The RECEIVE drive/path default is used to define where you want to store your incoming mail. Complete the RECEIVE field for the appropriate drive/path where this incoming mail should be stored.

Receive mail on A: drive	Type A:\
Receive mail on hard disk	Type C:\DATA\MAIL

51846 7246

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2 - Personal

1. From the USER DEFAULTS Menu, select 2 PERSONAL.

```
PS/PC  5                    USER DEFAULTS                          WAIT
-----------------------------------------------------------------------

         1 DISK PATHS          DISK DEFAULTS
         2 PERSONAL            YOUR ID, PASSWORD, METHODS OF OPERATION
         3 ATTACHMENT          HOST ATTACHMENT TYPE
         4 COMMUNICATIONS      FOR ASYNCHRONOUS COMMUNICATIONS AND 3270-PC
         5 LOGON               HOST LOGON/LOGOFF INFORMATION
         6 INTERFACE           APPLICATION PROGRAMS
         7 BYPASS              PANEL BYPASS DEFAULTS
         8 HOST PASSWORD       CHANGE YOUR HOST PASSWORD

        TAB TO A CHOICE AND PRESS [ENTER]
     MESSAGE: OR TYPE THE NUMBER OR THE FIRST LETTER OF A CHOICE

-----------------------------------------------------------------------
 STATUS: HOST TRACE OFF     LOCAL TRACE OFF    COMMUNICATIONS LINK TO NONE
  F1  HELP      F5 PREVIOUS       F7 DOS   F8 MAIN   F9 DISCON
```

2. The PERSONAL DEFAULTS menu will be displayed.

```
PS/PC  5                    PERSONAL DEFAULTS                    WAIT
-----------------------------------------------------------------------
   USER INFORMATION DEFAULT               >  DIVISION/REGION NAME
        USERS NAME                        >  DIVISION/REGION NUMBER
        USER ID
    HOST DEFAULTS
        HOST ADDRESS                      > RJRT
        TYPE OF PASSWORD                  > 1
        HOST PASSWORD                     > (FIELD SHOULD BE BLANK)
        HOST PRINTER NAME                 >
        JOB NAME FOR HOST PRINT REQUEST   > PCJOB
        RECEIVE RFT DOCUMENTS VIA HOST    > 1
        MAXIMUM SIZE OF RECEIVED DOCUMENTS > 9000
     NOTE DEFAULTS
        REQUEST APPEND                    > 2
        FORCE APPEND ON REPLY             > 2
        REPLY/SEND WITH A MESSAGE         > 2
YOUR NAME USED IN AUTHOR FIELD OF DOCUMENT DESCRIPTION
MESSAGE: MAKE ADDITIONS OR CHANGES, THEN PRESS [ENTER]. PGDN FOR MORE DETAILS
-----------------------------------------------------------------------
        STATUS: HOST TRACE OFF    LOCAL TRACE OFF  COMMUNICATIONS LINK TO NON
 1 HELP       F5 PREVIOUS        F7 DOS   F8 MAIN    F9 DISCON
```

51846 7247

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. For USER NAME, type the name of your Division/Region. For example, Winston-Salem Division.

4. For USER ID, type the number of your Division/Region. This number is also used as your electronic mail user ID (e.g., 2126).

5. Press [TAB].

6. For HOST PASSWORD, delete any text in this field. At this time you do not have a password. Instructions for setting a password are in the last section of this discussion.

7. All other defaults on this menu should be the same as shown above.

8. Press [PAGE DOWN] to go to the next menu.

```
PS/PC  5                  PERSONAL DEFAULTS                         WAIT
------------------------------------------------------------------------

     SEND DEFAULTS                                  > 2
       PRIORITY                                     > 1
       CONFIRM DELIVERY                             > 2
       PERSONAL                                     > 2
       CREATE SEND ITEM IN FILE CABINET             > 1
     LIBRARY DOCUMENT DEFAULTS
       MAXIMUM DOCUMENTS TO FIND                    > 100
       MAXIMUM MINUTES TO FIND DOCUMENTS            > S
       AND SEPARATOR CHARACTER                      > .
       OR SEPARATOR CHARACTER                       > ?
       STRING CUTOFF CHARACTER                      > *
       CREATE LSTORE ITEMS IN FILE CABINET          > 1
     MISCELLANEOUS DEFAULTS
       FIDELITY MESSAGES                            > 2
       BEEP WHEN AN ERROR OCCURS                    > 1
       PC PRINTER TYPE                              > 1
       PC PRINTER PAGE WIDTH                        > 08.5
       PC PRINTER PAGE LENGTH                       > 11.0

CHOOSE ONE 1 - YES  2 - NO
MESSAGE: MAKE ADDITIONS OR CHANGES, THEN PRESS [ENTER]. PGUP FOR MORE DETAILS
------------------------------------------------------------------------
       STATUS: HOST TRACE OFF    LOCAL TRACE OFF  COMMUNICATIONS LINK TO NON
 1 HELP      F5 PREVIOUS        F7 DOS   F8 MAIN    F9 DISCON
```

9. Verify that your defaults are the same as above. If not, please change.

10. Press [ENTER] when finished, The USER DEFAULTS Menu will be displayed.

51846 7248

 © R.J. Reynolds Tobacco Company 1993

3 - Attachment

1. From the User Defaults a Menu, select 3 ATTACHMENT. The Host Attachment menu will be displayed.

```
PS/PC  5                    USER DEFAULTS                          WAIT
------------------------------------------------------------------------

        1 DISK PATHS          DISK DEFAULTS
        2 PERSONAL            YOUR ID, PASSWORD, METHODS OF OPERATION
        3 ATTACHMENT          HOST ATTACHMENT TYPE
        4 COMMUNICATIONS      FOR ASYNCHRONOUS COMMUNICATIONS AND 3270-PC
        5 LOGON               HOST LOGON/LOGOFF INFORMATION
        6 INTERFACE           APPLICATION PROGRAMS
        7 BYPASS              PANEL BYPASS DEFAULTS
        8 HOST PASSWORD       CHANGE YOUR HOST PASSWORD

      TAB TO A CHOICE AND PRESS [ENTER]
    MESSAGE: OR TYPE THE NUMBER OR THE FIRST LETTER OF A CHOICE

------------------------------------------------------------------------
 STATUS: HOST TRACE OFF       LOCAL TRACE OFF    COMMUNICATIONS LINK TO NONE
   F1  HELP      F5 PREVIOUS       F7 DOS    F8 MAIN    F9 DISCON
```

2. Verify that HOST ATTACHMENT is 2. If not, please change.

```
PS/PC  5                    HOST ATTACHMENT                        WAIT
------------------------------------------------------------------------
  HOST ATTACHMENT ----> 2    1 - ASYNCHRONOUS COMMUNICATIONS

                             2 - PC 3270 EMULATION PROGRAM
                                 4700 PC APPLICATION SERVICES OR
                                 IBM 3270 WORKSTATION PROGRAM

                             3 - PC 3270 EMULATION PROGRAM, ENTRY LEVEL

                             4 - PC SUPPORT/38

                             5 - AS/400 PC SUPPORT

                             6 - PC SUPPORT/38

HOW YOUR PC IS CONNECTED TO THE HOST
MESSAGE: TYPE THE NUMBER FOR YOUR HOST ATTACHMENT AND PRESS [ENTER]

------------------------------------------------------------------------
 STATUS: HOST TRACE OFF       LOCAL TRACE OFF    COMMUNICATIONS LINK TO NONE
   F1  HELP      F5 PREVIOUS       F7 DOS    F8 MAIN    F9 DISCON
```

51846 7249

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. Press [ENTER] when finished. The User Defaults Menu will be displayed.

4 • Communications

1. From the USER DEFAULTS menu, select 4 COMMUNICATIONS. The *Communications Equipment Defaults* menu will be displayed.

```
PS/PC  9             COMMUNICATION EQUIPMENT DEFAULTS                   WAIT
------------------------------------------------------------------------\----

 3270-PC CONNECTION INFORMATION

  SHORT NAME =====>    A

   ASYNCHRONOUS CONNECTION INFORMATION
      HOST PHONE NUMBER                                >
      MODEM DIAL TYPE                                  > 1
      PORT NUMBER OF PC COMMUNICATIONS ADAPTER         > 1
      LINE SPEED                                       > 1200
      LINE PARITY                                      > 2
      NUMBER OF STOP BITS                              > 1
      DIALING MODEM CONTROL STINRG                     > ATDT
      ANSWERING MODEM CONTROL STRING                   > ATSO = 1


  THE HOST SESSION SHORT NAME (CHOOSE A LETTER FROM A-Z)
  MESSAGE: MAKE ADDITIONS RO CHANGES, THEN PRESS (ENTER)

-----------------------------------------------------------------------------
STATUS: HOST TRACE OFF      LOCAL TRACE OFF    COMMUNICATIONS LINK TO NONE
  F1  HELP     F5 PREVIOUS      F7 DOS    F8 MAIN   F9 DISCON
```

2. For SHORT NAME, the default is A:.

3. Do not change any other defaults. The other defaults are not used.

4. Press [ENTER] when finished. The USER DEFAULTS Menu will be displayed.

51846 7250

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5 - Logon

1. From the USER DEFAULTS MENU, select 5 LOGON. The Host Logon/Logoff Defaults Menu will be displayed.

```
PS/PC 11                    HOST LOGON/LOGOFF DEFAULTS                      WAI
-------------------------------------------------------------------------------

   NOTE: THIS PANEL APPLIES ONLY FOR HOST ATTACHMENT TYPES 1, 2 AND 3.

   HOST TRANSACTION ID                                      > DSV1

   FOR AUTOMATIC LOGN
     HOST MESSAGE 1                                         > MSG10
     USER COMMAND 1                                         > CICSP05
     HOST MESSAGE 2                                         >
     USER COMMAND 2                                         >
     HOST MESSAGE 3                                         > WELCOME
     USER COMMAND 3                                         >
     HOST MESSAGE 4                                         >

   FOR AUTOMATIC LOGOFF
    COMMAND                                                 > CESF LOGOFF
    ACKNOWLEDGEMENT                                         >

 AN IDENTIFIER REQUIRED FOR HOST CONNECTION
 MESSAGE: MAKE ADDITIONS OR CHANGES, THEN PRESS [ENTER]
-------------------------------------------------------------------------------
 STATUS: HOST TRACE OFF      LOCAL TRACE OFF    COMMUNICATIONS LINK TO NONE
   F1 HELP      F5 PREVIOUS      F7 DOS    F8 MAIN    F9 DISCON
```

2. Verify that your defaults are the same as above. If not, please change. All defaults must be typed with capital letters.

3. Under "For automatic logoff - Command" type CESF LOGOFF.

4. Press [ENTER] when finished. The USER DEFAULTS menu will be displayed.

51846 7251

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8 - Host Password

Passwords have not been set up for your User ID. It is important that a password be used for security purposes. Follow these instructions to set up a password.

1. From the USER DEFAULTS menu, select 8 HOST PASSWORD. The Change Your Host Password Menu will be displayed.

```
PS/PC  1                    CHANGE YOUR HOST PASSWORD                    WAIT
------------------------------------------------------------------------------

 WHEN ENTERING YOUR PASSWORD, UPPERCASE AND LOWERCASE ARE IMPORTANT.
 PASSWORD: PASSWORD AND password are all different.

   Your Current Password  =======>

   Your New Password      =======>

   Your current host password
   Message: enter the password and press [enter].

------------------------------------------------------------------------------
STATUS: HOST TRACE OFF       LOCAL TRACE OFF     COMMUNICATIONS LINK TO NONE
  F1  HELP       F5 PREVIOUS       F7 DOS   F8 MAIN   F9 DISCON
```

2. Press [TAB] to YOUR NEW PASSWORD field.

3. Type a password. Your password can be uppercase/lowercase letters or numbers.

4. When finished, press [ENTER]. PS/PC will logon to the host to make this change.

To verify your password

5. From the USER DEFAULTS Menu, select 2 PERSONAL.

6. Press [TAB] until you reach the HOST PASSWORD field. Your new password will display, This password is automatically submitted by PS/PC during the logon process.

7. Press [F8]. The MAIN TASKS Menu will be displayed.

51846 7252

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Faxes

Receiving Faxes

When faxes are received, the PC should review the content and addressee and distribute to the appropriate personnel.

Sending Faxes

The PC will receive instruction that a fax needs to be sent. Refer to the fax machine manuals for details.

51846 7253

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7254

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7255

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VOUCHERS (TEMPORARY PAYMENT SYSTEM)

Summary

Vouchers are company-issued checks that are requested through the Temporary Payment System. These checks are utilized to make payment for Temporary Displays, ongoing Office Expenses, Merchandiser Bonus Payments and other miscellaneous expenses.

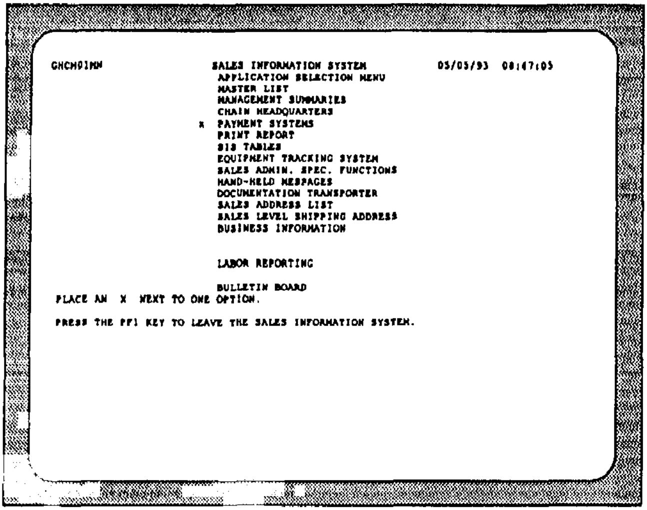
Office Expenses

Prior to requesting a voucher for an expense, an account can be established and verification of amount owed and type of expenditure must be in the SC's possession. Discuss with the Region Operations Manager what guidelines your Region and Sales Area have regarding proper verification.

Creation of an Account for a New Vendor

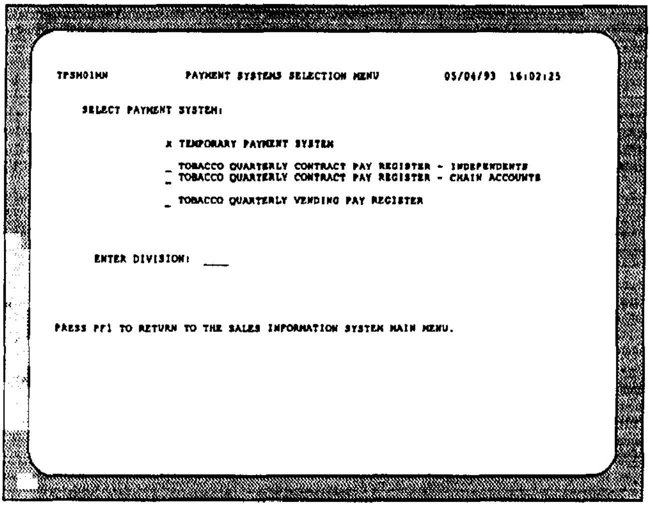
New accounts should only be created for vendors for which relatively regular, ongoing payments will occur. The PC should consult with the Region Operations Manager if he/she feels as submitted vendor does not fit this criteria.

1. Select *Payment Systems* from the SIS Main Menu and press [ENTER].



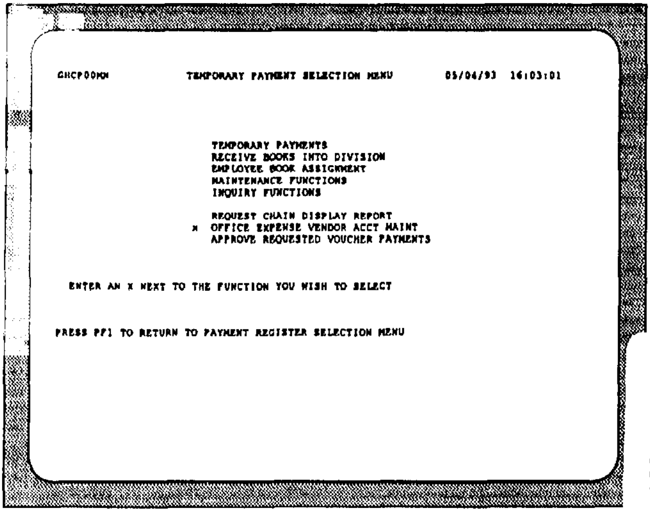
51846 7256

2. Select *Temporary Payment System* and press [ENTER].



```
TPSH01MN          PAYMENT SYSTEMS SELECTION MENU          05/04/93  16:02:25

    SELECT PAYMENT SYSTEM:

              x TEMPORARY PAYMENT SYSTEM

              _ TOBACCO QUARTERLY CONTRACT PAY REGISTER - INDEPENDENTS
              _ TOBACCO QUARTERLY CONTRACT PAY REGISTER - CHAIN ACCOUNTS

              _ TOBACCO QUARTERLY VENDING PAY REGISTER

      ENTER DIVISION: ____

PRESS PF1 TO RETURN TO THE SALES INFORMATION SYSTEM MAIN MENU.
```

3. Select *Office Expense Vendor Acct Maint* and press [ENTER].



```
GHCP00MN          TEMPORARY PAYMENT SELECTION MENU          05/04/93  16:03:01

                 TEMPORARY PAYMENTS
                 RECEIVE BOOKS INTO DIVISION
                 EMPLOYEE BOOK ASSIGNMENT
                 MAINTENANCE FUNCTIONS
                 INQUIRY FUNCTIONS

                 REQUEST CHAIN DISPLAY REPORT
               x OFFICE EXPENSE VENDOR ACCT MAINT
                 APPROVE REQUESTED VOUCHER PAYMENTS

  ENTER AN X NEXT TO THE FUNCTION YOU WISH TO SELECT

PRESS PF1 TO RETURN TO PAYMENT REGISTER SELECTION MENU
```

51846 7257

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

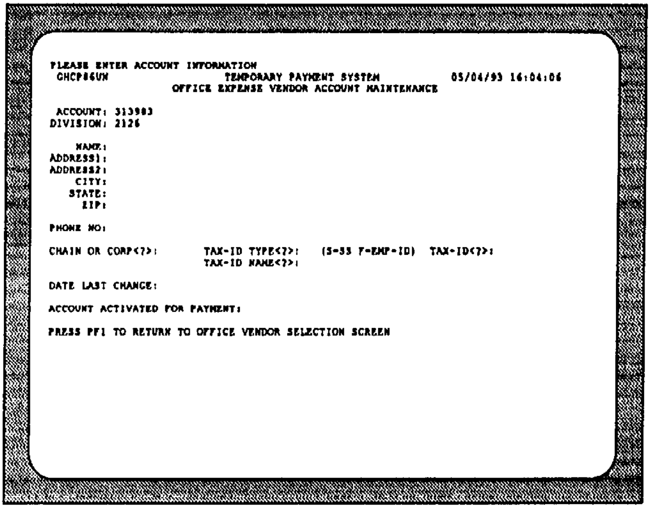
4. Press [ENTER] until the first blank position appears. Type "A" at that first blank position and press [ENTER].

```
GHCP86UN           TEMPORARY PAYMENT SYSTEM          05/04/93 16:03:34
                 SELECT OFFICE VENDOR ACCOUNT

ACT   ACCOUNT      NAME                      ACTIVATED FOR PAYMENT
---   -------      ----                      ---------------------
_     313510       SOUTHERN BELL INC.
_     313517       BILL'S PUB
_     313519       DANNYS HAULING
_     313523       HARPERS NIGHT SCHOOL
_     313535       TEST ACCOUNT
_     313685       TEST ADDRESS ROUTINE            05/10/91
_     313629       MAID SERVICES
_     313391       CITY WATER                      09/10/90
_     313771       NAME TEST
_     313772       TEST
_     313901       RALEIGH TEST #3
A
_
_
_
ENTER X-DISPLAY   C-CHANGE   A-ADD
PRESS PF1 TO RETURN TO THE TEMPORARY PAYMENT SYSTEM SELECTION MENU
```

51846 7258

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The *Office Expense Vendor Account Maintenance* screen appears. An account number will automatically be assigned by the system.



```
PLEASE ENTER ACCOUNT INFORMATION
 GHCP86UN                TEMPORARY PAYMENT SYSTEM            05/04/93 16:04:06
                  OFFICE EXPENSE VENDOR ACCOUNT MAINTENANCE

 ACCOUNT: 313983
DIVISION: 2126

    NAME:
ADDRESS1:
ADDRESS2:
    CITY:
   STATE:
     ZIP:

PHONE NO:

CHAIN OR CORP<?>:        TAX-ID TYPE<?>:   (S-SS F-EMP-ID)  TAX-ID<?>:
                         TAX-ID NAME<?>:

DATE LAST CHANGE:

ACCOUNT ACTIVATED FOR PAYMENT:

PRESS PF1 TO RETURN TO OFFICE VENDOR SELECTION SCREEN
```

6. Using a copy of the invoice from the account you are adding or a rental agreement in the case of outside storage or postage meter rentals, input the requested data. The following must be included:

- Complete name/address (only address 2 line is optional)
- Account's phone number
- A "Y" to indicate vendor is incorporated
- A "N" to indicate vendor is not incorporated. If you entered "N", the Tax ID Type and the Tax ID sections must be completed.

◆ *Note:* The PC need only know whether the entity is incorporated; all Government entities, as well as electric, natural gas, and phone companies should be considered incorporated and noted with a "Y".

7. Print the screen. Press [ENTER].

51846 7259

 © *R.J. Reynolds Tobacco Company 1993*

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. Stamp the screen print with the Field Sales Account Verification stamp available at the Operations Unit.

- Circle New in the section of the stamp labeled New/Updated Vendor
- Staple the copy of the invoice to this print screen. The original will be needed later for payment processing.
- Review to ensure information on stamp matches information on the print screen.
- Attach note indicating what the new account is to be paid for (e.g., surplus, phone, etc).

TPS - OFFICE EXPENSE PAYMENTS
FIELD SALES
ACCOUNT VERIFICATION

Requested by:

Div# ______________ Date ________

Circle: New/Updated Vendor

Name ______________________

Div Management Signature

____

APPROVED BY:

AM-F ______________ Date ________

D/A ______________ Date ________

ACTIVATED BY:

SFS ______________ Date ________

❖ *Note:* Complete additional information as appropriate. The Region Operations Manager should approve these accounts by signing in the Division Management Signature Book. The APPROVED BY section of this form is no longer applicable.

9. Once all information is verified as correct, all copies of the print screen and the invoice along with an explanation of what the account is to be paid for (supplies, taxes, etc.) should be faxed or mailed to Sales Financial Services (SFS). The original invoice and print screen should be placed in a file titled "New/Updated Accounts Pending Verification."

51846 7260

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

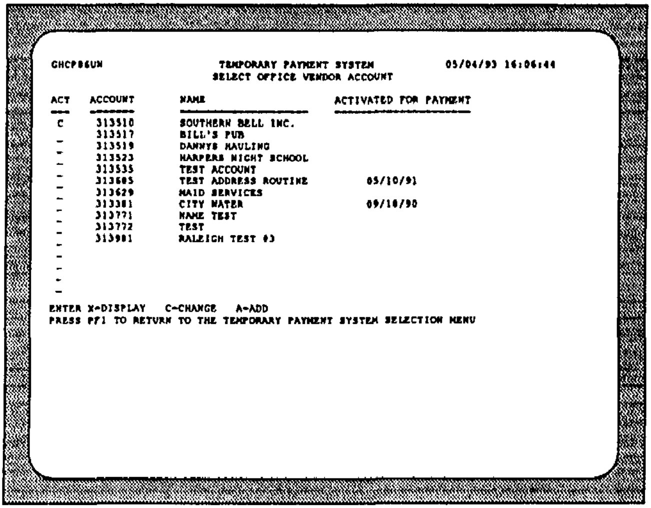
10. At this point, no further action can be taken until the account is activated by the Sales Area. A weekly report titled "Previous Week's Accounts Activated" report will print at the Operation Unit weekly. This report will list any accounts activated during the previous week.

- You do not need to wait for this report to determine if a vendor has been activated. Simply access the "Office Expense Vendor Account Maintenance" screen to see if the vendor is ready for payments to be made.

Vendor Account Update

Vendor Account Name and Address Update Procedures

1. Select Payment System from the SIS Main Menu and press [ENTER].
2. Select Temporary Payment System and press [ENTER].
3. Select Office Expense Vendor Account Maintenance and press [ENTER].
4. Type "C" next to the account you want updated.



GHCP86UN TEMPORARY PAYMENT SYSTEM 05/04/93 16:06:44
SELECT OFFICE VENDOR ACCOUNT

ACT	ACCOUNT	NAME	ACTIVATED FOR PAYMENT
C	313510	SOUTHERN BELL INC.	
_	313517	BILL'S PUB	
_	313519	DANNYS HAULING	
_	313523	HARPERS NIGHT SCHOOL	
_	313535	TEST ACCOUNT	
_	313605	TEST ADDRESS ROUTINE	05/10/91
_	313629	MAID SERVICES	
_	313381	CITY WATER	09/18/90
_	313771	NAME TEST	
_	313772	TEST	
_	313981	RALEIGH TEST #3	

ENTER X-DISPLAY C-CHANGE A-ADD
PRESS PF1 TO RETURN TO THE TEMPORARY PAYMENT SYSTEM SELECTION MENU

51846 7261

 © R.J. Reynolds Tobacco Company 1993

5. Overtype any appropriate data you wish to change.

```
PLEASE ENTER CHANGES
 GHCP06UM                  TEMPORARY PAYMENT SYSTEM           03/04/93 16:07:10
                     OFFICE EXPENSE VENDOR ACCOUNT MAINTENANCE

 ACCOUNT: 313510
DIVISION: 2126

    NAME: SOUTHERN BELL INC.
ADDRESS1: P.O. BOX 778
ADDRESS2:
    CITY: WINSTON-SALEM
   STATE: NC
     ZIP: 27102

PHONE NO: 919 748 5577

CHAIN OR CORP<?>: Y     TAX-ID TYPE<?>:   (S-SS F-EMP-ID)  TAX-ID<?>:
                        TAX-ID NAME<?>:

DATE LAST CHANGE: 11/01/90

ACCOUNT ACTIVATED FOR PAYMENT:

PRESS PF1 TO RETURN TO OFFICE VENDOR SELECTION SCREEN
```

6. Print the screen once the changes have been made. Press [ENTER].

7. Stamp the screen print with the "Field Sales Account Verification" stamp available at the Operations Unit.

   - Circle UPDATED in the section of the stamp labeled "New/Updated Vendor."
   - Staple the copy of the invoice to this print screen. The original will be needed later for payment processing.
   - Review to ensure information on the stamp matches the information on the print screen.

8. Once all information is verified as correct, copies of the print screen and the invoice should be faxed or mailed to the Area Manager — Finance. **This must be done anytime the PC makes any change on any portion of the vendor's data. When these changes occur, the account is deactivated** — the PC cannot process any payments until the vendor has been reactivated.

51846 7262

Account Deletions

1. From time to time, the PC will be informed by management or sales reps that an account should be deleted.

2. A written request should be sent by the PC to Sales Finance in order to have an account deleted from your list of available and active office expense vendors.

3. When the processing of the PC's request is complete, the account will no longer appear on the system listing of accounts.

Office Expense Payment System

Office Expense Payment System - Vouchers Requested Via This System

1. The PC should understand the office expenses that are required to be made via this system. They are:

   - Electricity
   - Natural gas/heating oil
   - Water/sewage
   - Telecommunications
   - Garbage Collection
   - Monthly office security payments
   - Office cleaning (if not done by RJRT part time employees)
   - Copier lease payments
   - Office supplies
   - Fax machine annual maintenance payments
   - Outside storage (for rental agreements covering at least 1 year)
   - Postage meter rental payments
   - Postage meter postage
   - Courier service
   - Outside agency temporary labor
   - Vehicle rented for use in overhead installation
   - UPS/RPS
   - Property taxes for vehicle registration (if paid with property taxes)
   - Any other frequently used vendors on an as-needed basis

2. Any questions regarding the merit of placing a vendor on the system should be directed to the Region Operations Manager. This should be the only form of payment for these expense types. In other words, once established on TPS, no draft or cash payments should be made for vendor in payment for the above services.

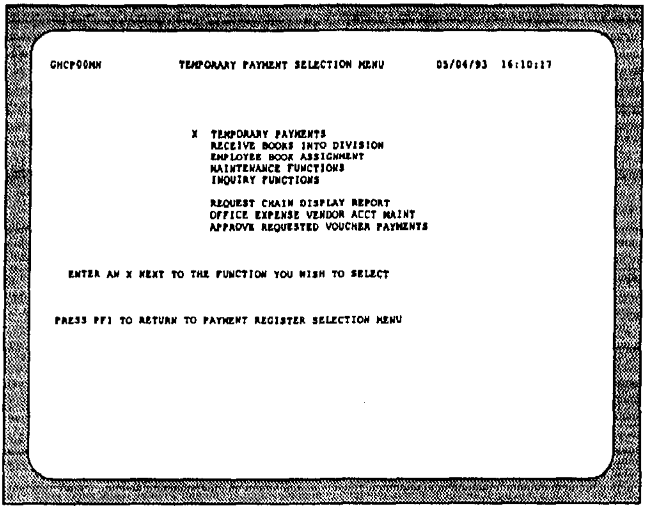
51846 7263

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Invoice Payment Procedures

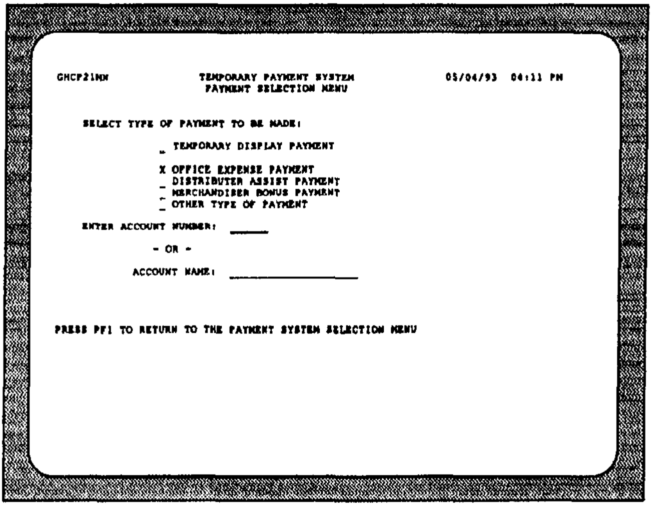
1. For most office expenses, the account will submit an invoice from which it will be paid.
   - A monthly invoice is not required for rental payments associated with outside storage and postage meter rentals.
   - For postage meter postage payments, a check can be requested in advance to be used for payment. The invoice should be obtained upon receipt of postage and kept as documentation.
2. Select Payment System from the SIS Main Menu and press [ENTER].
3. Select Temporary Payment System and press [ENTER].
4. Select Temporary Payment.



51846 7264

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Select "Office Expense Payment" and press [ENTER]. An account may also be selected by inputting its account number.



51846 7265

 © R.J. Reynolds Tobacco Company 1993

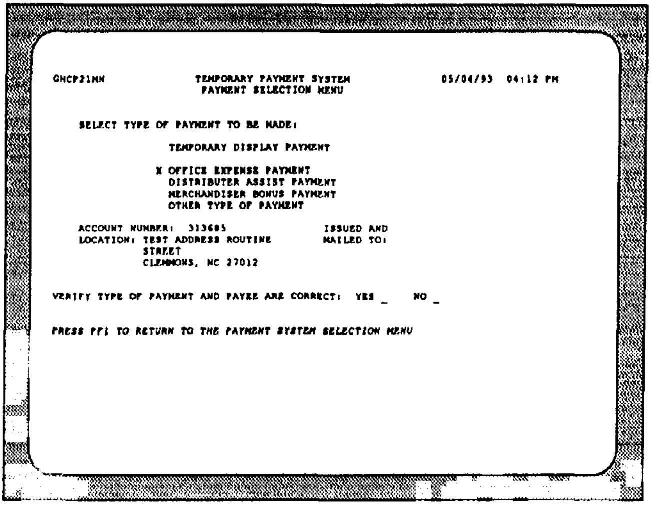
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. The following screen displays a list of activated calls for which payment may be made. Place an "X" next to each account for which payment should be processed. While you may select multiple accounts, the system will only allow for processing one at a time.

```
GHCP21MN            TEMPORARY PAYMENT SYSTEM            05/04/93  04:11 PM
               SELECT ACCOUNT FROM MASTER ACCOUNT LIST
                                                  DISPLAYED:   2 OF   2

 ACCOUNT   ACCOUNT NAME          ADDRESS             CITY            ST  ZIP
 - ------  --------------------  ------------------  --------------  --  -----
 X 313605  TEST ADDRESS ROUTINE  STREET              CLEMMONS        NC  27012
 _ 313301  CITY WATER            MAIN STREET         WINSTON-SALEM   NC  27011
 _
 _
 _
 _
 _
 _
 _
 _
 _
 _
 _
 _

ENTER 'X' TO SELECT ACCOUNT,        PRESS ENTER TO CONTINUE
PRESS PF1 TO RETURN TO THE TEMPORARY PAYMENT SYSTEM SELECTION MENU
```

51846 7266

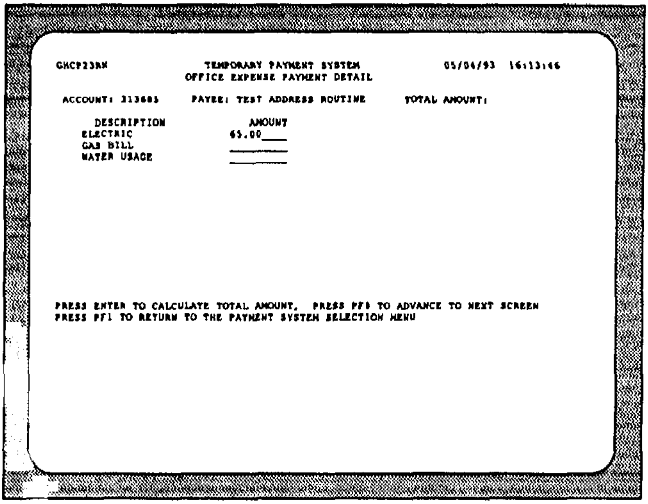
7. This screen indicates the account chosen. Verify that the correct account is appearing by entering "X" in the appropriate blank. If No is punched in, the system will automatically return you to the screen shown in the previous step.



51846 7267

 © R.J. Reynolds Tobacco Company 1993

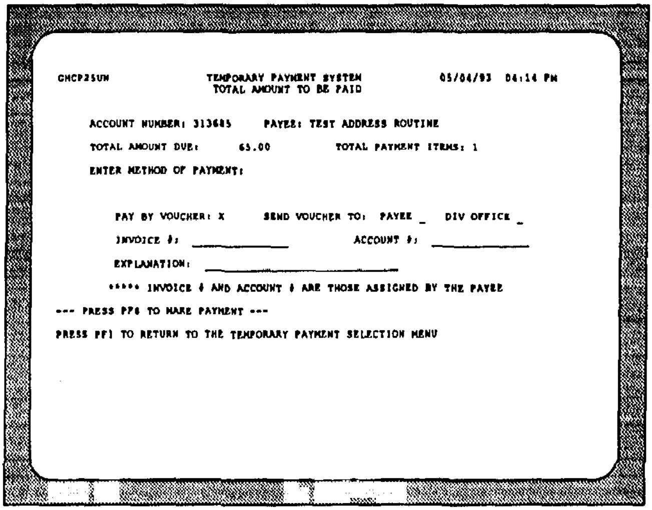
8. This screen highlights a scroll list of expense categories. Move the cursor next to the expense category best describing the payment to be made. Input the $ amount to be paid to the vendor.



- Invoice discounts/credits should be taken where possible
- Only current month charges should be input (previous months' balances should have been processed from their original invoice)
- Press [ENTER] to calculate the total amount (top right hand corner) and press [PF8] to continue.

© R.J. Reynolds Tobacco Company 1993

9. At this screen, the PC should enter a free-form explanation of the office expense being paid. It is very important to enter the invoice number and account number for office payments, if this information is available on the invoice. This explanation will not appear on the check being processed.


CHCP25UN TEMPORARY PAYMENT SYSTEM 05/04/93 04:14 PM
TOTAL AMOUNT TO BE PAID

ACCOUNT NUMBER: 313645 PAYEE: TEST ADDRESS ROUTINE

TOTAL AMOUNT DUE: 65.00 TOTAL PAYMENT ITEMS: 1

ENTER METHOD OF PAYMENT:

PAY BY VOUCHER: X SEND VOUCHER TO: PAYEE _ DIV OFFICE _

INVOICE #: ____________ ACCOUNT #: ____________

EXPLANATION: ______________________

***** INVOICE # AND ACCOUNT # ARE THOSE ASSIGNED BY THE PAYEE

--- PRESS PF6 TO MAKE PAYMENT ---

PRESS PF1 TO RETURN TO THE TEMPORARY PAYMENT SELECTION MENU

- The "Pay by Voucher" portion of the screen will always contain an "X" when working in the Office Expense Payment System.
- The PC may elect to send the payment directly to payee or have it sent to the Operations Unit for disbursement. Check with the Region Operations Manager to discuss guidelines.

51846 7269

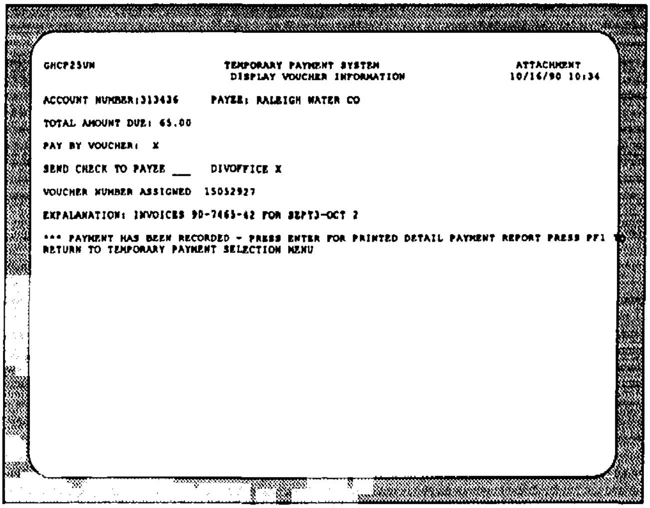
 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

10. The following screen summarizes the payment just processed. The PC should verify the payee and $ amount one more time. If accurate, press [PF8] to make the payment. If inaccurate, press [PF1] to back out of the system and resubmit.

```
GHCP35UN                TEMPORARY PAYMENT SYSTEM              ATTACHMENT
                        DISPLAY VOUCHER INFORMATION           10/16/90 10:34

ACCOUNT NUMBER:313436     PAYEE: RALEIGH WATER CO

TOTAL AMOUNT DUE: 65.00

PAY BY VOUCHER:  X

SEND CHECK TO PAYEE ___   DIVOFFICE X

VOUCHER NUMBER ASSIGNED

EXPALANATION: INVOICES 90-7465-42 FOR SEPT3-OCT 2

******VOUCHER PAYMENT HAS BEEN SELECTED*************

___ PRESS PF 8 TO MAKE PAYMENT
___ PRESS PF1 TO RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

11. The following screen indicates all data regarding payment just submitted. Press [ENTER] to continue.



```
GHCP25UN                 TEMPORARY PAYMENT SYSTEM              ATTACHMENT
                          DISPLAY VOUCHER INFORMATION          10/16/90 10:34

ACCOUNT NUMBER:313436     PAYEE: RALEIGH WATER CO

TOTAL AMOUNT DUE: 65.00

PAY BY VOUCHER:  X

SEND CHECK TO PAYEE ___   DIVOFFICE X

VOUCHER NUMBER ASSIGNED  15052927

EXPALANATION: INVOICES 90-7465-42 FOR SEPT3-OCT 2

*** PAYMENT HAS BEEN RECORDED - PRESS ENTER FOR PRINTED DETAIL PAYMENT REPORT PRESS PF1 TO
RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

51846 7271

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

12. Verify the destination of the Payment Detail Report and press [ENTER].

- *Note:* *A Temporary Payment System Detail report will print for every* payment made. These details must be retained with the original invoice.

```
GHCP25UN            TEMPORARY PAYMENT SYSTEM                ATTACHMENT
                   DISPLAY VOUCHER INFORMATION          10/16/90 10:34

     **** DETAIL PAYMENT WILL BE PRINTED AT THE FOLLOWING LOCATION **

                     REPORT DESTINATION 4426

     ****** PRESS ENTER TO PRINT DETAIL PAYMENT REPORT **************

          ENTER PF1 TO RETURN TO TEMPORARY SYSTEM SELECTION MENU
```

51846 7272

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7273

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK V: SYSTEMS COORDINATOR

51846 7274

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK V

Systems Coordinator *Procedures*

© R.J. Reynolds Tobacco Company 1993

51846 7275

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

BOOK V:
SYSTEMS COORDINATOR

The position of Systems Coordinator (SC) involves the proper administration of all activities related to SIS reporting, drafts/vouchers, 7101s, and contract maintenance. The SC should have a sound understanding of the RJRT computer system and be able to troubleshoot problems in each area of accountability.

The SC also manages labor reporting and the submission of expense reports.

CHAPTER 1: PAYMENT SYSTEMS.................................... 1-1

DRAFTS.. 1-1

Summary... 1-1

Ordering Draft Books.................................... 1-1

Receiving Draft Books................................... 1-1

Issuing Draft Books..................................... 1-4

Transferring Draft Books................................ 1-10

Voiding Drafts/Draft Books.............................. 1-12

Disposition of Completed Drafts/Draft Books............. 1-14

Resolving Draft Errors.................................. 1-15

Errors.. 1-19

Removals.. 1-20

Error Messages.. 1-20

General Notes... 1-24

VOUCHERS (TEMPORARY DISPLAY PAYMENTS).................... 1-26

Summary... 1-26

General Guidelines...................................... 1-26

Obtaining Proper Documentation.......................... 1-26

Requesting Vouchers..................................... 1-31

Distributor Assist/VAPs................................. 1-36

Obtaining Proper Documentation (VAP/DAP)................. 1-37

51846 7276

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Requesting VAP/DAP Payments 1-37
MERCHANDISER BONUS PAYMENTS 1-47
Requesting Bonus Payments Via TPS 1-47
Tracking Contracts 1-50
CHAPTER 2: PAY REGISTERS 2-1
Summary 2-1
Preliminary Activities 2-1
Adjusting Pay Chain Registers 2-6
Adjusting INFO Section 2-9
Add Option 2-10
Search Option 2-10
Delete Option 2-11
Special Check Handling 2-11
Payment Detail Section 2-12
Add Option 2-12
Change Option 2-12
Delete Option 2-13
Pay Register Approval for Chain Accounts Under Division Responsibility 2-13
Pay Register Adjustments for Independent Accounts 2-14
ACCOUN T INFO Section 2-14
Add Option 2-15
Search Option 2-15
Delete Option 2-16
PAYMENT DETAIL Section 2-16
Add Option 2-16
Change Option 2-17
Delete Option 2-17

51846 7277

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Pay Register Approval for Independent Accounts.................... 2-17
Approve Option.................... 2-17
Final Pay Register.................... 2-18
TROUBLESHOOTING.................... 2-18
Unapproving Quarterly Payments Report.................... 2-18
Unapproving Preliminary Pay Register.................... 2-18
Problems With RJRT Checks.................... 2-18
Lost or Missing Checks.................... 2-18
Stolen Checks.................... 2-19
Stop Payment.................... 2-19
Undeliverable or Returned Checks.................... 2-19
Exception Payments.................... 2-19
Overpayments.................... 2-19
Pay Register Historical Reporting.................... 2-20
VENDING PAY REGISTERS.................... 2-20
Adjusting Vending Pay Register.................... 2-47
Chain/Corporate Vendors and Branches.................... 2-47
Additional Reports.................... 2-48
CHAPTER 3: REQUESTING REPORTS.................... 3-1
Summary.................... 3-1
Preliminary Activities.................... 3-1
Master List Utilities.................... 3-1
Obtaining Scroll Lists.................... 3-2
Master List Account Selection.................... 3-4
List of Direct Accounts.................... 3-4
List of Retail Accounts Currently Participating in Specific VAP Program.................... 3-6
M10 - Select by Contract.................... 3-8

51846 7278

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M11 - Accounts Called On/Not Called On 3-9
M12 - Selection by Merchandisers 3-10
M13 - List Brand by Distribution 3-11
M14 - Master List Call by Classification 3-12
M16 - Selection by Account Market 3-14
M17 - Master List by Volume 3-15
M03 - Account Scroll 3-16
M31 - View/Update Standard Account Information 3-18
M34 - Account Calls Made by Month 3-21
M35 - View/Update Contracts 3-22
M37 - View/Update Merchandiser/Account Marketing 3-24
M38 - View/Update Temporary Displays 3-26
M70 - Print Report Menu 3-27
Account Coverage Report 3-29
Temporary Display Detail Report 3-30
Contract Lookup by Rows 3-32
Temporary Display Summaries 3-34
Report Formatting 3-35
Merch/Acct Mkt Summaries 3-37
Contract Summaries 3-38
Standard Master List 3-39
VAP Account Scroll List Detail 3-40
Scroll Master List 3-42
Activity Summary 3-43
VAP Account Scroll List Summary 3-46
Account Recap 3-48
Brand Distribution Report 3-49

51846 7279

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Account Labels 3-50
Account Specific Profile 3-51
Print Reports 3-53
Historical Report Selection Menu 3-59
Contract Payment by Account Number 3-60
Contract Payment - Alphabetical 3-61
Contract Payment by Chain Accounts 3-62
Warehouse Product List 3-63
Retail Account Coverage 3-64
Daily Sales Rep 3-65
Contract Summaries Report 3-66
Master Account List 3-67
Coupon Management 3-68
Merch/Acct Market 3-70
Address Labels 3-70
Management Summaries 3-73
CHAPTER 4: 7101 ENTRY 4-1
Summary 4-1
Preliminary Notes 4-1
IRS Requirements 4-1
Standard Account Screen Directions 4-2
Creating New Account 4-3
Deleting Account 4-9
Changing Account 4-14
Adjusting Contracts 4-17
M35 - View/Update Contracts 4-18
7101 Errors 4-20

51846 7280

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 5: LABOR REPORTING.................................. 5-1
Summary.. 5-1
Part-Time Labor Reporting.................................. 5-1
Reporting of Full-Time and Part-Time Labor Hours.................... 5-3
Procedures.. 5-3
How to Use LRS.. 5-4
T&A Codes - Regular Employees................................ 5-9
T&A Codes - Part-Time Employees.............................. 5-10
CHAPTER 6: EXPENSE REPORTS.................................. 6-1
Preliminary Notes.. 6-1
Processing Expense Reports.................................. 6-1
Accessing SES... 6-2
Start a Batch.. 6-4
Restart a Batch.. 6-6
Delete a Batch... 6-8
Print a Batch.. 6-9
Approve a Batch for Payment.................................. 6-10
Change an Expense Report..................................... 6-11
Delete an Expense Report..................................... 6-14
View/Print Expense Report.................................... 6-15
Expense Code Inquiry... 6-16
Analysis Code Inquiry.. 6-18
Car Master Screen.. 6-19
Field Personnel Payment History.............................. 6-20
Batch Control Inquiry.. 6-25
Employee Master Inquiry...................................... 6-27
Field Personnel Mileage History.............................. 6-29

51846 7281

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 1
Payment Systems

51846 7282

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

DRAFTS

Summary

The administration coordinator has the responsibility for verification, issuance, maintenance and accounting of all draft books issued to personnel with the Region. In addition, the Systems Coordinator (SC) must maintain all unissued draft books under lock in the Region Operations Unit.

Ordering Draft Books

1. The Region Operations Unit should maintain all supplies of draft books. The SC should maintain reasonable supplies on hand to satisfy ongoing needs. Normally, a 1-month supply is sufficient.
2. With the Region Operations Manager, the SC should establish a "build-to" figure to ensure proper levels of books are maintained in the operations unit.
3. The SC should monitor supplies closely, and order as needed to the "build to" figure.
4. Draft books are to be ordered through the SMS System. The pertinent commodity numbers are as follows:

   $500 drafts (5 sets of 25/SKU) - #312348
   $5000 drafts - #183471
   Draft book covers - #111971

Receiving Draft Books

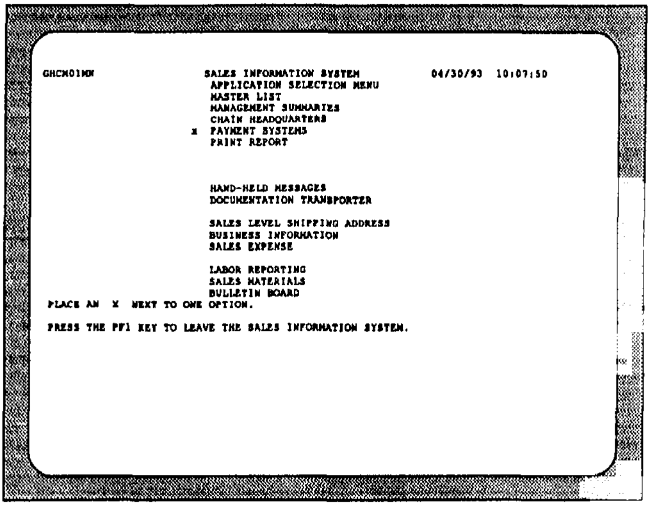
1. On receipt of draft books, check each to ensure that they contain 25 drafts per book and that the drafts are sequentially numbered. Report any discrepancies immediately to the Disbursements accounting department (Cash accounting section) for resolution. Books must be formally received into the Operations Unit, utilizing the Payment System in SIS.

51846 7283

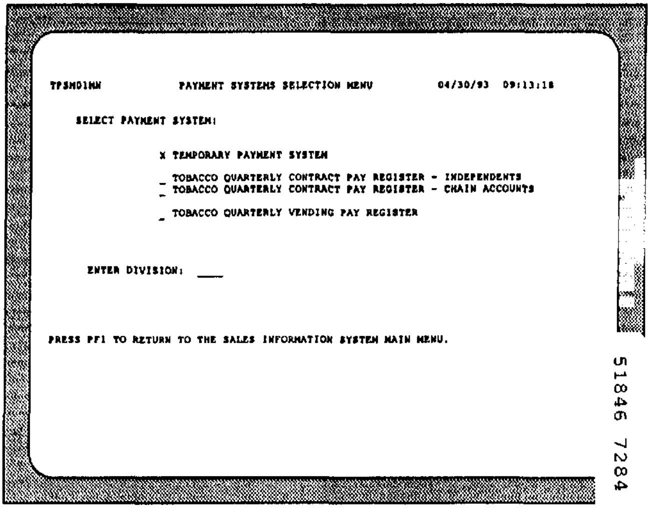
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. Mark an "X" beside *Payment Systems* and press [ENTER].



3. Select *Temporary Payment Systems* and press [ENTER].

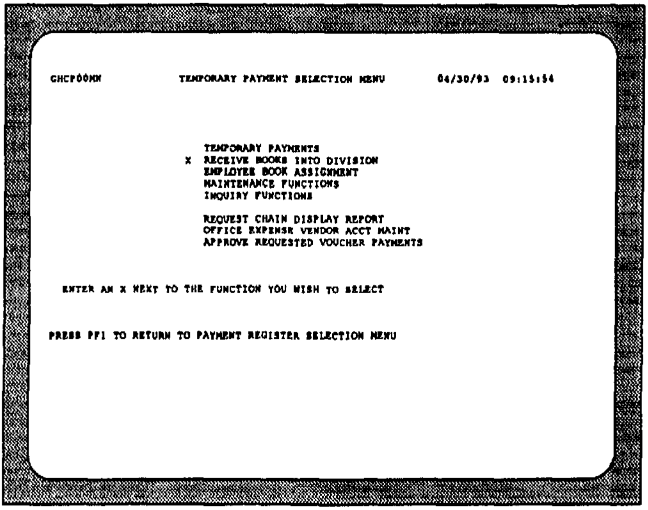


51846 7284

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Select *Receive Books Into Division* and press [ENTER].



Copyright © R.J. Reynolds Tobacco Company 1993

51846 7285

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The following screen indicates all draft books which are in transit to the Operations Unit. Place an "X" next to the appropriate book.

```
GHCP07UN            TEMPORARY PAYMENT SYSTEM            04/30/93  09:16:29
                 RECEIVE DRAFT BOOKS INTO DIVISION

LIST OF ALL BOOKS THAT ARE INTRANSIT TO DIVISION: 2126

      BEGINNING        ENDING         DATE
     DRAFT NUMBER   DRAFT NUMBER     SHIPPED

    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
    _       0             0
******7***   DIVISION DOES NOT HAVE ANY BOOKS INTRANSIT
MARK 'X' NEXT TO DRAFT BOOKS THAT HAVE BEEN RECEIVED
ENTER PF1 TO RETURN TO TEMPORARY DISPLAY INQUIRY MENU
```

6. Lock up all draft books immediately.

Issuing Draft Books

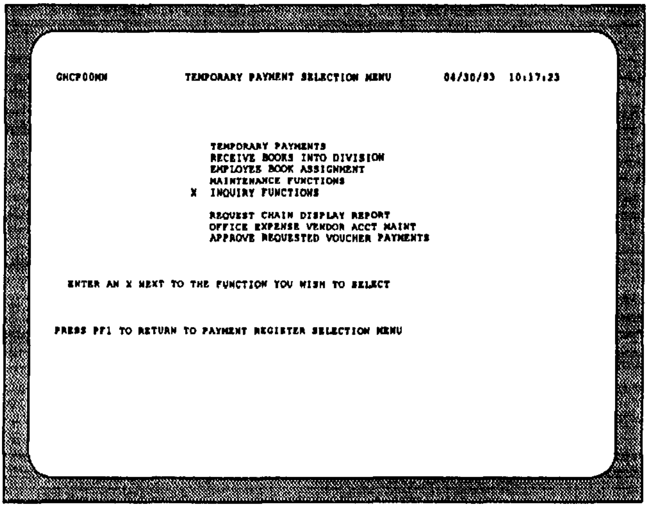
1. The SC receives supply requests from sales rep for draft book. Draft books can only be issued to company employees.
2. Before assigning new draft books, review the status of the books previously assigned to that employee and resolve any possible drafts found with a "clear - no draft", paid or blank status. Attention must be paid to the resolution of these error messages of prior issues before new books are sent.

51846 7286

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. Select *Payment Systems* from the SIS Main Menu and press [ENTER].
4. Select *Temporary Payments Systems* and press [ENTER].
5. Select *Inquiry Functions* and press [ENTER].



51846 7287

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. Enter the employee number. Review books previously assigned to this sales rep. Valid codes are:

- **COMPLETED** - All drafts are complete and accounted for.
- **ASSIGNED** - Indicates at least one drafts is still pending.

```
GHCP131N              TEMPORARY PAYMENT SYSTEM           04/30/93  09:32:23
                  EMPLOYEE BOOK ASSIGNMENT INQUIRY

EMPLOYEE NUMBER:  69359            DIVISION: 6324

     BEGINNING       ENDING        DATE       BOOK
    DRAFT NUMBER   DRAFT NUMBER   ASSIGNED   STATUS

             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
             0              0
**********   EMPLOYEE HAS NOT BEEN ASSIGNED ANY BOOKS
ENTER PF1 TO RETURN TO TEMPORARY DISPLAY INQUIRY MENU
```

7. If all books are completed, a new book may be issued. If any books are still assigned, use [PF1] to return to the previous screen.

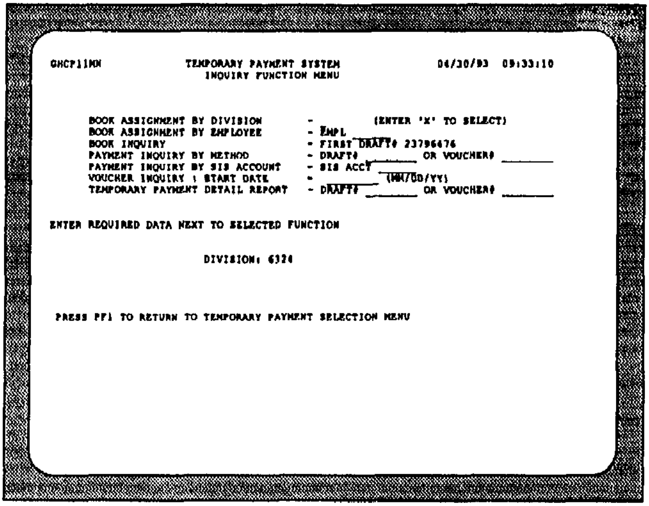
51846 7288

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. Enter the beginning draft number of the books in questions. This screen displays a list of each individual draft from the draft book requested, and its current status. Five different status conditions are possible.

- **CLEAR - NO DRAFT** - Draft has been written, deposited, and has cleared the bank but has not been entered into the System, or is involved in a keying error or communication problem.
- **BLANK** (no status) - Draft use is unaccounted for, may or may not have been written and/or voided, may or may not clear the bank, but is considered to be written and unentered.
- **PAID** - Draft has been written and entered into the system but has not yet cleared the bank.
- **CLEARED BANK** - Draft has been written, entered into the system and has cleared the bank.
- **VOID** - Draft has been voided in the system via the P/C.

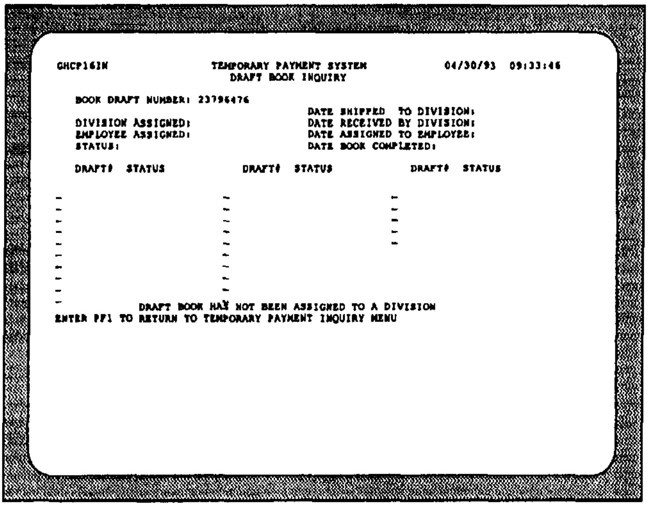


51846 7289

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

9. Of these statuses the first two clearly give the most cause for concern. These are drafts which need to be addressed with sales reps to resolve their outstanding status. "Paid" status, while unresolved, is largely out of the hands of RJR responsibility. In these cases, this status may require the SC to contact the account to determine the disposition of the draft. The final two statuses are completely resolved.


GHCP163N TEMPORARY PAYMENT SYSTEM 04/30/93 09:33:46
DRAFT BOOK INQUIRY

BOOK DRAFT NUMBER: 23796476
DATE SHIPPED TO DIVISION:
DIVISION ASSIGNED: DATE RECEIVED BY DIVISION:
EMPLOYEE ASSIGNED: DATE ASSIGNED TO EMPLOYEE:
STATUS: DATE BOOK COMPLETED:

DRAFT# STATUS DRAFT# STATUS DRAFT# STATUS

DRAFT BOOK HAS NOT BEEN ASSIGNED TO A DIVISION
ENTER PF1 TO RETURN TO TEMPORARY PAYMENT INQUIRY MENU

10. Once all drafts on a given draft book are successfully resolved, the book will receive the designation "complete." **The SC should pursue the reasonable resolution of outstanding drafts before issuing more!**

11. Upon satisfactory resolution of outstanding drafts, new books may be issued. To assign the draft book to the employee, select *Payment Systems* from the SIS Main Menu and press [ENTER].

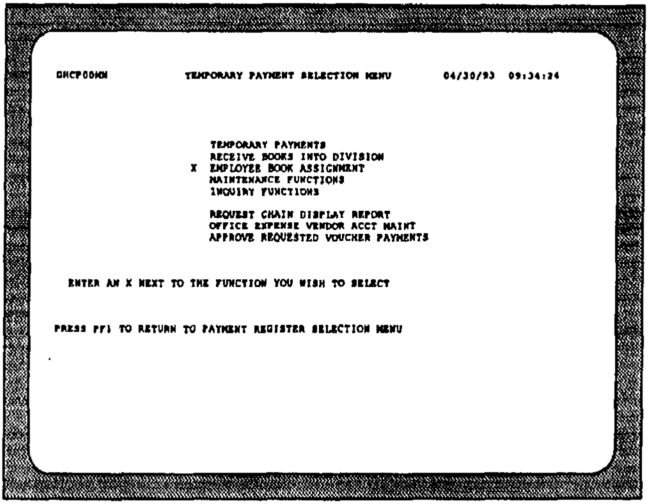
12. Select *Temporary Payment Systems* and press [ENTER].

51846 7290

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

13. Select *Employee Book Assignment* and press [ENTER].

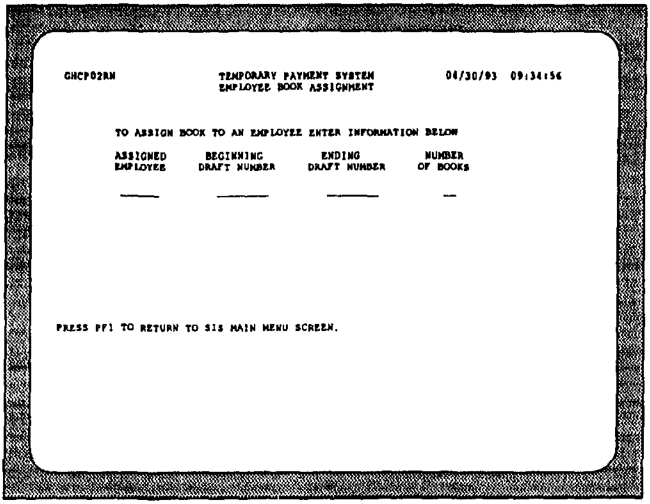


51846 7291

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

14. Input the employee number, beginning and ending draft number of the entire quantity being assigned and the number of books assigned. Care should be taken to ensure that all books are issued in sequential order from the Region Operations Unit.



Transferring Draft Books

1. Only FULL draft books may be reassigned to another employee or transferred to another Division.
2. If an employee is promoted, reassigned to another Division or is terminated, all PARTIAL draft books must be voided (see Voiding Drafts section.)
3. Any remaining full draft books must be Unassigned or Reassigned via the following steps.
4. Select *Payment Systems* from the SIS Main Menu and press [ENTER].
5. Select *Temporary Payment Systems* and press [ENTER].

51846 7292

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. Select *Maintenance Functions* and press [ENTER].

```
GHCP00MN          TEMPORARY PAYMENT SELECTION MENU        04/30/93  09:35:33

                      TEMPORARY PAYMENTS
                      RECEIVE BOOKS INTO DIVISION
                      EMPLOYEE BOOK ASSIGNMENT
                    X MAINTENANCE FUNCTIONS
                      INQUIRY FUNCTIONS

                      REQUEST CHAIN DISPLAY REPORT
                      OFFICE EXPENSE VENDOR ACCT MAINT
                      APPROVE REQUESTED VOUCHER PAYMENTS

  ENTER AN X NEXT TO THE FUNCTION YOU WISH TO SELECT

PRESS PF1 TO RETURN TO PAYMENT REGISTER SELECTION MENU
```

7. Select *Reassign Employee Draft book* and press [ENTER].

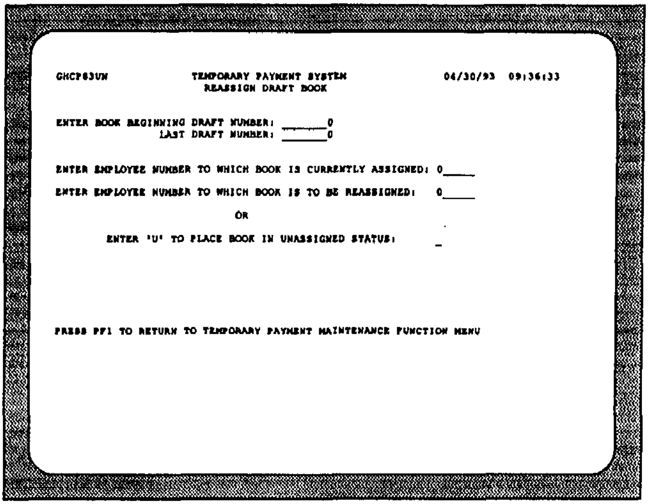
```
GHCP01MN             TEMPORARY PAYMENT SYSTEM          04/30/93  09:36:01
                     MAINTENANCE FUNCTION MENU

                 _ VOID DRAFTS
                 X REASSIGN EMPLOYEE DRAFT BOOK
                 _ TRANSFER DRAFT DETAIL TO ANOTHER DRAFT

   ENTER 'X' NEXT TO SELECTED FUNCTION

                     DIVISION: 6324

PRESS PF1 TO RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

51846 7293

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. Enter appropriate information regarding the transfer.


GHCP03UN TEMPORARY PAYMENT SYSTEM 04/30/93 09:36:33
REASSIGN DRAFT BOOK

ENTER BOOK BEGINNING DRAFT NUMBER: ______0
LAST DRAFT NUMBER: ______0

ENTER EMPLOYEE NUMBER TO WHICH BOOK IS CURRENTLY ASSIGNED: 0_____

ENTER EMPLOYEE NUMBER TO WHICH BOOK IS TO BE REASSIGNED: 0_____

OR

ENTER 'U' TO PLACE BOOK IN UNASSIGNED STATUS: _

PRESS PF1 TO RETURN TO TEMPORARY PAYMENT MAINTENANCE FUNCTION MENU

- Books may be reassigned to another employee or placed in an unassigned status. Unassigned books should be placed in Operations Unit lockup.

Voiding Drafts/Draft Books

1. As usual, drafts voided in the Field must be phoned into the Operations Unit during that work day. Additionally, the white "original" draft should be immediately sent to the Operations Unit.
2. Upon notification of the need to void a draft/draft book, utilize the following steps.
3. Select *Payment Systems* from the SIS Main Menu and press [ENTER].
4. Select *Temporary Payment Systems* and press [ENTER].
5. Select *Maintenance Functions* and press [ENTER].

51846 7294

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

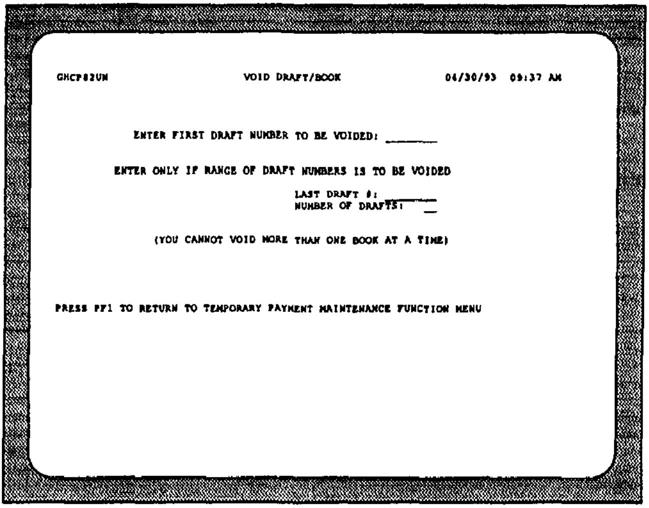
6. Select *Void Drafts* and press [ENTER].

```
OHCP8INN            TEMPORARY PAYMENT SYSTEM          04/30/93  09:37:00
                    MAINTENANCE FUNCTION MENU


              X VOID DRAFTS
              _ REASSIGN EMPLOYEE DRAFT BOOK
              _ TRANSFER DRAFT DETAIL TO ANOTHER DRAFT

  ENTER 'X' NEXT TO SELECTED FUNCTION


                    DIVISION: 6324



PRESS PF1 TO RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7295

7. This screen is utilized to void both one or more drafts. Enter the draft number only, if it is a single draft. Enter the range of draft numbers and the total drafts to be voided if more than one draft.



Disposition of Completed Drafts/ Draft Books

1. Sales Reps will return completed drafts books with all blue copies attached. However, there are several cases where the SC may receive blue tissue copies of written drafts.

- If draft is written to a new call, or if a call outside the rep's normal territory is made, the blue copy of the draft will be sent to the SC. The draft must then be punched in under Temporary Payments Systems. See the Temporary Payments System section for details.

- If the draft error occurred when the rep punched in draft at retail, the rep will immediately send in the blue copy for correction. Again, this is done via Temporary Payments.

51846 7296

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- If the draft is voided at retail, the rep submits the white copy of the draft. The blue copy should be retained in the draft book. Handle voids as instructed in Voiding Drafts/Draft Books.

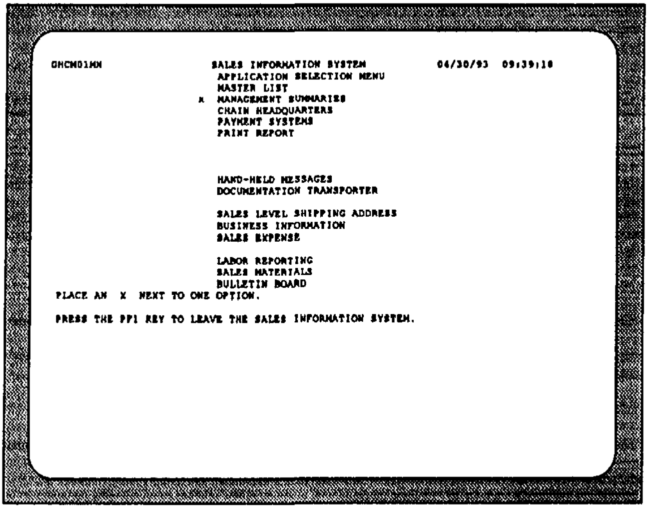
Resolving Draft Errors

1. The SC should review the Daily Draft Activity Report (DDAR) (printed each morning) each day for possible listings of draft errors.

   It is important to address draft errors quickly as the Company's general ledger is not updated for a draft payment until all error messages pertaining to that draft are resolved.

2. Draft errors are normally much more easily handled when they are addressed immediately. After reviewing the Daily Draft Activity Report for errors, it will probably be necessary to determine information as to the account contacted, activities in the call, drafts written and for what item the payment is being made. To do this, SIS tracks and records general errors relative to drafts. However, error messages on the DDAR are general in nature. (See error messages in this section.)

3. Select *Management Summaries* from the SIS Main Menu and press [ENTER].

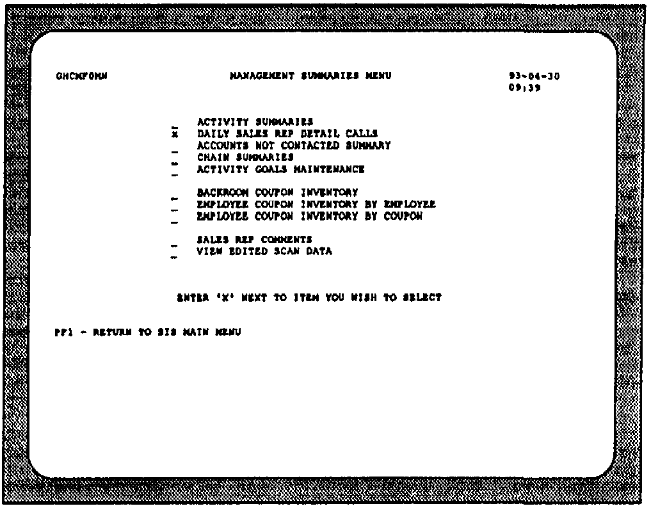


51846 7297

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Select *Daily Sales Rep Detail Calls* and press [ENTER].



51846 7298

 Copyright © R.J. Reynolds Tobacco Company 1993

5. Enter the employee number and date the listed error was made. The information is obtained from the *Daily Draft Activity Report.*

```
  GHCMF1MN          DAILY SALES REP DETAIL CALL          04/30/93
09:40:12

                  DIVISION-EMPLOYEE  6326 73234_

                        DATE  06/28/93
```


51846 7299

6. The screen indicates calls made on the date requested by the employee.

GHCMF1MN DAILY SALES REP DETAIL CALL VIEWING MENU 07/30/93 08:50:1

ACCOUNT	NAME	ADDRESS	CALL CLASS
302094	FOOD FAIR #8	1415 S HAWTHORNE RD.	K2
302086	REVCO DRUG 511	2132 CLOVERDALE AVE.	K4
449868	1 STOP INC. HDQTRS.	627-A N. MAIN ST.	K4
385177	B/P GULF #01992	2700 PETERS CREEK	B2
511457	ROSES #396	SOUTHPARK PLAZA	K2

_ MARK AN X HERE TO SEE ALL CALLS FOR THIS REP & DATE.

MARK AN X NEXT TO EACH DETAIL CALL YOU WISH TO SEE.

PRESS PF1 TO RETURN TO THE DAILY SALES REP DETAIL CALL MENU.

7. Place an "X" by any call desired or all calls to view detail of activities recorded by that rep in that call. Print the screen showing activity relative to the draft.

8. With this preliminary activity accomplished, the following will provide general overview of errors and a description of several different error types and how they should be resolved.

51846 7300

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

```
CHCMF2RN                DAILY SALES REP DETAIL CALL        07/30/93  08:51:22

DIVISION-EMPLOYEE 2126-046713
EMP NAME AYERS JR M          FOOD FAIR #8              STORE VOLUME          852
DATE           06/15/93      1415 S HAWTHORNE RD.      CALL CLASSIFICATION  R02
ACCOUNT        302094        WINSTON SALEM             LAST CALL DATE  05/14/93
ROUTE          025           NC    27103               CALLS THIS QTR         3

ADV PLACED    PAPER 13
PDI CHANGE    (NONE)
MERCH CHANGE  (NONE)
DISPLAYS
WIN CTN DISPLAY        1 PLACED     RENEWED :    15.00  HEADQUARTER CHECK

DORAL $4.00 CPN        7 PLACED     RENEWED :           NO PAYMENT
CONTRACTS     (NO NON-COMPLIANCE REPORTED)

PRESS ENTER TO CONTINUE THE DAILY DETAIL ACTIVITY.
PRESS PF1 TO RETURN TO THE CALL ACTIVITY VIEWING MENU.
PRESS PF2 TO PRINT THE DAILY DETAIL ACTIVITY.
```

Errors

A given Error Message may be prompted by various causes or "error types." As the Error Message is on the Daily Draft Activity Report, only a generalized error indicator, it is necessary to determine the specific error type which caused the appearance of the message in order to take appropriate action to resolve.

While an error message is most frequently prompted by an erroneous keying entry, the appearance of an error message does not necessarily mean that a keying error has occurred or that a draft entry was inappropriate.

Examples

- An error message will result when a draft is entered from a book which is unassigned in the System.
- An error message may result from a Secretary's correcting entry which preceded a hand-held communication or which bypassed an existing error message.
- An error message will result from an entry keyed for a new account for which an SIS account number is as yet unassigned.

In this latter example, the account received payment promptly, the drafts use is accounted for and the payment detail is included in the "Daily Sales Reps Detail Call" information. While the SIS account number must still be assigned and the draft entered through the PC, this would have been done even if the handheld

51846 7301

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

entry had not been made. Thus the benefits of the handheld entry outwiegh delayed payment and/or delayed PC entry for avoidance of an error message.

Removals

With few exceptions, error messages are not removed automatically as a result of a corrected entry. For example, one such exception is Error Type 1 for Error Message **DRAFT NO HAS NOT BEEN ASSIGNED TO AN EMPLOYEE.** The message will automatically be deleted from the error report on the day following successful assignment of the Draft Book in the system.

The messages are monitored, normally daily, by the Home Office where they are deleted upon noting that a correcting entry has been made and has fully resolved the error listed. Therefore, error messages are normally off reports on the 2nd day following the SC's correcting entry.

An error message may also be deleted following an SC's discussion with the Home Office as to the resolve action to be taken as outlined in detail in the resolve steps found under the various Error Message Types.

Error Messages

DRAFT # HAS NOT BEEN ASSIGNED TO AN EMPLOYEE

POSSIBLE PROBLEM 1 A draft has been written from a book which is unassigned in the Temporary Payment System

RESOLUTION

- Determine the territory for the SIS account number listed with the error
- Assign the draft book in the Temporary Payment System to the Sales Rep whose territory has been determined to include the account.
- Make a "Book Inquiry" to confirm a successful book assignment

Note: Unlike Error Type 2, drafts listed with this error message do not require reentry as they will be received automatically into the System that night following the book assignment.

51846 7302

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

POSSIBLE PROBLEM 2 A draft number from an unassigned book belonging to another Division has erroneously been keyed into the hand-held unit.

RESOLUTION

- Determine the territory for the SIS account number listed with the error
- Contact the Sales Rep to determine the correct draft number for the account listed with the error. Confirm account name, date written and amount paid.
- Print payment detail screens for this account in the "Daily Sales Rep Detail Call."
- Reenter the draft using the screens printed and the correct draft number.

ERROR **DRAFT # HAS ALREADY BEEN ENTERED; DRAFT NUMBER IS ALREADY COMPLETE AND CLEARED BANK; DRAFT # HAS ALREADY BEEN VOIDED.**

ERROR TYPE 1 The SC has made a corrected or voided draft entry by passing the draft error listed or preceding a handheld communication.

RESOLUTION

- The Home Office will delete the listed error normally by the 2nd report following the secretary's entry mentioned above.

ERROR TYPE 2 A draft number, correctly entered at an earlier date, has been erroneously rekeyed in the handheld unit and is a lower number than the draft number written more recently.

Example:

- Draft number 21100026-3 was written & entered correctly on September 1.
- Draft number 21100046-3 was written on September 4, but was entered as draft number 21110026-3 in error.

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7303

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ERROR TYPE 3

A draft number, erroneously entered at an earlier date, which was greater than the draft number written at that time, has been rekeyed correctly for a more recently written draft. The draft error listed is actually a valid entry. The earlier erroneous entry may require reentry.

Example:

- Drafter number 2110051-1 was written on September 1 but was entered as draft number 21100058-3 in error. Draft number 21100058-3 was written and entered correctly on September 4.

RESOLUTION

- Make a "book inquiry" to see if any drafts have a skipped or "clear no draft" status which will need resolving with the Sales Rep and which will normally include a draft number related to the listed error.
- On the Book Screen, "X" and enter the draft number of the listed error to determine if the listed error is a result of an error type 1. If it is an error type 1, no further action is required. If it is not an error type 1, print this draft screen for possible use later.
- Contact the Sales Rep to determine the correct draft number for the SIS account listed with the error and to determine all necessary information for entering any skipped drafts noted in the Book Inquiry.
- If it is an error type 2:
  - Print payment detail screens for this account in the "Daily Sales Rep Detail Call."
  - Reenter the draft using the screen printed and the correct draft umber.
- If found to be an error type 3 and not previously corrected:
  - Use the draft screen printed in step 2 to reenter under its correct draft number.
  - Call the Home Office to back out the draft initially entered in error. The valid draft listed in error will not require reentry and will automatically enter the system that night.

51846 7304

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ERROR	ACCOUNT # IS UNASSIGNED, MISSING OR OUTSIDE REP'S TERRITORY
ERROR TYPE 1	A draft has been entered for a new call for which an SIS account number has not been assigned.
ERROR TYPE 2	A draft has been entered for an existing account for which the SIS account number was unknown to the Sales Rep.
ERROR TYPE 3	A draft has been entered for an existing account belonging to another Territory or Division which is outside the boundary limits possible for draft entry completion by the Sales Rep's handheld unit.

RESOLUTION

- Make a "Book Inquiry" to see all drafts with a skipped or "clear no draft" status which will need resolving with the Sales Rep.
- Print the payment detail screens in the "Daily Sales Rep Detail Call" for all "O" account containing payment details totaling the amount listed in the error and possible containing the account name.
- Contact the Sales Rep to determine the status of the account, new or existing, and to determine all necessary information for entering any skipped drafts noted in the "Book Inquiry."
- Check the SIS Master List to confirm the account's status and to avoid possible multiple account number assignment.
- If error type 1, add the new account to the SIS Master List and secure the new SIS account number.
- If error type 2 or 3, secure the existing SIS account number.
- Reenter the draft using the correct account number and using payment details printed earlier in step 2.

51846 7305

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

ERROR **DRAFT CLEARED BANK - TOTAL AMOUNT DOES NOT MATCH BANK AMOUNT OF _____**

ERROR TYPE 1 A draft payment has been erroneously overkeyed or underkeyed for a correctly written draft amount, or a draft payment has been correctly keyed for an erroneously overwritten or underwritten draft amount.

RESOLUTION

- Make a "Book Inquiry" to determine all drafts with a skipped or "clear, no draft" status which need to be resolved with the Sales Rep.
- Access the Daily Sales Rep Detail Call and print payment details for the account listed with the error in the Daily Draft Activity Report.
- Contract the Sales Rep to determine why the handheld entry does not agree with the written draft amount.
  - If the written draft amount was actually correct, reenter the draft using payment details supplied by the Sales Rep. Notify the Division Manager of the occurrence.
  - If the keyed total was actually correct, and the draft was overwritten or underwritten for the amount due the account, consult the Division Manager for determination of payment details to be entered to agree with the amount which cleared the bank.

General Notes

1. Check for draft errors when the *Daily Draft Activity Report* is printed each morning.
2. Begin error resolves promptly as they are generally resolved more easily and quickly the earlier handled.
3. Unresolved errors eventually result in *Bank Suspense Lists* and increased communications with Sales Reps and the Home Office.
4. Make a "Book Inquiry" for all errors listed in the *Daily Draft Activity Report* per book involved.
5. 9th digits (check digits) of draft numbers can be determined if any 9th digit in the book is known as they run in descending order 7 though 1 in cycle but vary for 1st draft from book to book.
6. Voided drafts may only be unvoided by the Home Office.

51846 7306

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. Draft numbers entered erroneously, for a correct account and payment, can be backed out by the Home Office if the draft status is Paid but not if "cleared bank." (see note 8.)

8. Before an erroneously entered draft number is backed out, it should be determined if this draft has been, or needs to be, reentered under its correct draft number. A "Book Inquiry" and "SIS account Inquiry" are frequently helpful in making this determination.

9. SIS account numbers entered erroneously, for a correct draft number and payment, can be changed by the Home Office. The Division Manager must be notified of this error/change.

10. An error message or error entry does not have to be deleted by the Hme Office prior to the PC entry provided the draft status is skipped or "clear draft."

51846 7307

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VOUCHERS (TEMPORARY DISPLAY PAYMENTS)

Summary

Generally, speaking, sales representatives utilize drafts to make payment to chains/calls for which they are responsible. However, from time to time, the Region personnel may request that payments be made through the TPS system. In those cases, the sales rep/manager should provide direction as to which promotions are being paid, how many units of the item in questions and over what time period the activity should be pulled.

General Guidelines

- The SC may not request a single voucher for over $250,000.
- The SC may not request a group of vouchers for over $250,000. The TPS system will not process vouchers entered over $50,000 until online approval has been secured from the Sales Finance. Contact Sales Finance to obtain specific guidelines on the documentation necessary to support voucher payments over $50,000. A report will be generated daily listing vouchers pending approval. These vouchers can also be viewed online under the *TPS Selection Menu*. Vouchers pending approval will be assigned a request number starting with "8888" until they are approved.
- Vouchers over $250,000, proper documentation (invoices, etc.) plus a copy of the SIS MSS screen (detailing the pertinent activity in the call in question) should be immediately forwarded to the Sales Finance for review, after processing has occurred.

Obtaining Proper Documentation

1. Upon submission of TPS request by appropriate personnel, the SC should access available information relative to payment specifics:
   - Promotion (displays, VPR's etc.)
   - Quantity (number of units to be paid for)
   - Length of time from which to draw activities (if appropriate)
   - Account number of location to which payment should be made
2. If the payment requires a tabulation of chain display activity, utilize the following steps.

   A. Select *Payment Systems* from the SIS Main Menu and press [ENTER].

   B. Select *Temporary Payment Systems* and press [ENTER].

51846 7308

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

C. Select *Request Chain Display Report* and press [ENTER].

```
GHCP00MN          TEMPORARY PAYMENT SELECTION MENU        05/04/93  16:10:57


                     TEMPORARY PAYMENTS
                     RECEIVE BOOKS INTO DIVISION
                     EMPLOYEE BOOK ASSIGNMENT
                     MAINTENANCE FUNCTIONS
                     INQUIRY FUNCTIONS

                  X  REQUEST CHAIN DISPLAY REPORT
                     OFFICE EXPENSE VENDOR ACCT MAINT
                     LIST VOUCHER PENDING APPROVAL


  ENTER AN X NEXT TO THE FUNCTION YOU WISH TO SELECT


PRESS PF1 TO RETURN TO PAYMENT REGISTER SELECTION MENU
```

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7309

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

D. Input the following:

- Chain ID number
- Time frame for which activity should be pulled
- Type of report desired (usually complete store list)
- Report sequence

```
OHCP1DIN            TEMPORARY PAYMENT SYSTEM              05/04/93  16:19:50
                   CHAIN DISPLAY REPORT REQUEST

                                                       PRINT ONLY STORES
CHAIN ID: 3184 00 00                                    FOR SALES LEVEL: XXXX

SELECT DATE RANGE  -  FROM: 01 / 04 / 93    (MM/DD/YY)
                   -  THRU: 03 / 31 / 93

SELECT TYPE OF REPORT:    _ STORES WITH DISPLAY
                          _ STORES WITHOUT DISPLAY
                          X COMPLETE STORE LIST
                            (CHOOSE ANY OR ALL OF THE ABOVE REPORTS)

SELECT REPORT SEQUENCE:   X CHAIN GROUP SEQUENCE
                          _ DIVISION SEQUENCE


 PRESS PF1 TO RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

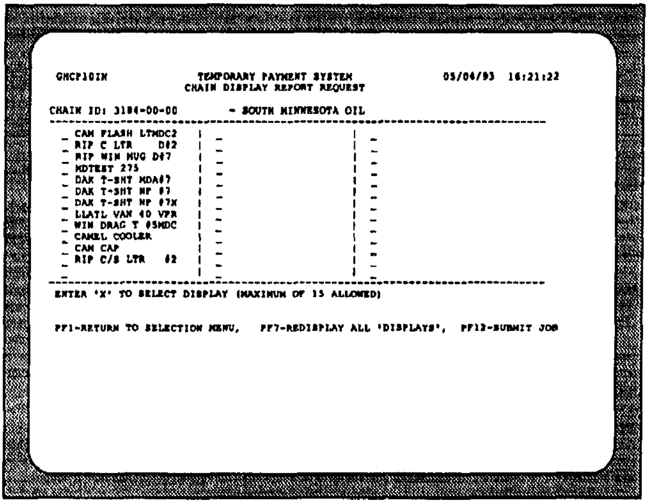
Stores with Display generates distribution of only stores receiving display.

51846 7310

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

E. These screens display the entire range of display and VPR payment possibilities. Up to 15 entries may be made at one time. Select proper promotions by placing an "X" next to the appropriate displayed/VPR.



```
GHCP10IN               TEMPORARY PAYMENT SYSTEM            05/04/93  16:21:22
                      CHAIN DISPLAY REPORT REQUEST

CHAIN ID: 3184-00-00         - SOUTH MINNESOTA OIL
-------------------------------------------------------------------------------
_ CAM FLASH LTMDC2  |  _                    |  _
_ RIP C LTR    D#2  |  _                    |  _
_ RIP WIN MUG D#7   |  _                    |  _
_ MDTEST 275        |  _                    |  _
_ DAK T-SHT MDA#7   |  _                    |  _
_ DAK T-SHT NP #7   |  _                    |  _
_ DAK T-SHT NP #7X  |  _                    |  _
_ LLATL VAN 40 VPR  |  _                    |  _
_ WIN DRAG T #5MDC  |  _                    |  _
_ CAMEL COOLER      |  _                    |  _
_ CAM CAP           |  _                    |  _
_ RIP C/S LTR   #2  |  _                    |  _
_                   |  _                    |  _
-------------------------------------------------------------------------------
ENTER 'X' TO SELECT DISPLAY (MAXIMUM OF 15 ALLOWED)

PF1-RETURN TO SELECTION MENU,   PF7-REDISPLAY ALL 'DISPLAYS',  PF12-SUBMIT JOB
```

F. Once selections have been made, press [PF12] to submit the job for printing.

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7311

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

G. Verify data and press [ENTER] to print the report.

```
QHCP10IN            TEMPORARY PAYMENT SYSTEM              05/04/93  16:21:52
                 CHAIN DISPLAY REPORT PRINT REQUEST
                                                          PRINT ONLY STORES
** FOLLOWING DATA WAS SELECTED FOR CHAIN DISPLAY REPORT **     FOR: XXXX

   CHAIN ID: 3184-00-00   - SOUTH MINNESOTA OIL

   DISPLAY TYPE:


   DISPLAYED FROM:   02/04/93  TO  03/31/93
   REPORT TYPE:      COMPLETE STORE LIST

   REPORT SEQUENCE:  BY CHAIN GROUP
 **   CHAIN DISPLAY REPORT WILL BE PRINTED AT THE FOLLOWING LOCATION  **
              REPORT DESTINATION
**** DISPLAY PLAN WAS NOT SELECTED - REPORT WILL NOT BE PROCESSED **
PRESS ENTER TO PRINT REPORT
ENTER PF1 TO RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

H. The report obtained will provide information needed to request data TPS payment. It will also serve as documentation for requested payment. Refer to example of this report in the Reports section of this manual.

I. Issue copy to sales rep/manager as appropriate.

3. If the voucher requested is payment for VPRs, buy-downs, etc., proper documentation must be present. This should be invoices or velocity reports. **Under no circumstances should a request for voucher be processed without proper documentation.**

51846 7312

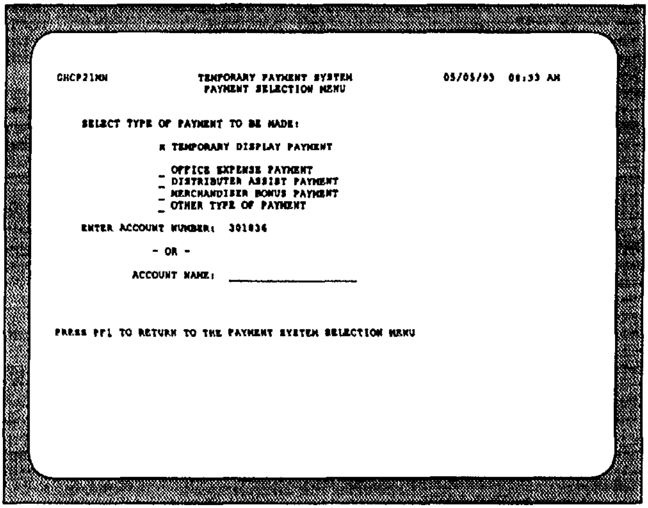
 Copyright © R.J. Reynolds Tobacco Company 1993

PAYMENT SYSTEMS

Requesting Vouchers

Requesting Vouchers for Temporary Displays/VPRs

1. Select *Payment System* from the SIS Main Menu and press [ENTER].
2. Select *Temporary Payment Systems* and press [ENTER].
3. Select *Temporary Display Payment* and press [ENTER]. It is also necessary to input the account number or name on this screen.



Copyright © R.J. Reynolds Tobacco Company 1993

51846 7313

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. After entry, the location and mail-to addresses will appear for the account number indicated. Verify that the information is correct and press [ENTER].

IMPORTANT: The "Mail" name and address (if completed) will be the name used as the payee on the check. Any discrepancies between "account name" and "mail name" are printed on the weekly TPS Payments Requested Through Division Office report.

```
OHCP21MW              TEMPORARY PAYMENT SYSTEM              05/05/93  08:33 AM
                      PAYMENT SELECTION MENU

   SELECT TYPE OF PAYMENT TO BE MADE:

              X TEMPORARY DISPLAY PAYMENT

                OFFICE EXPENSE PAYMENT
                DISTRIBUTER ASSIST PAYMENT
                MERCHANDISER BONUS PAYMENT
                OTHER TYPE OF PAYMENT

   ACCOUNT NUMBER:  301836               ISSUED AND
   LOCATION: LARRYS SUPER MARKET         MAILED TO: LARRYS SUPER MARKET
             2041 MILBURNIE RD.                     2041 MILBURNIE RD.
             RALEIGH, NC 27610                      RALEIGH, NC 27610

VERIFY TYPE OF PAYMENT AND PAYEE ARE CORRECT:  YES _    NO _

PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

51846 7314

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The following screens list the possible temporary display payment options. All display descriptions are in alphabetical order. Completing the *Next Description* line with a description or first letter of a description will automatically move the screen to that display.

```
GHCP24RN              TEMPORARY PAYMENT SYSTEM          05/03/93  08:34 AM
                       DISPLAY PAYMENT DETAIL

 ACCOUNT: 301036      PAYEE: LARRYS SUPER MARKET       TOTAL AMOUNT:
 NEXT DESCRIPTION: DORAL $3.00  VPR
DESCRIPTION           RATE   UNITS        AMOUNT
B1G1F COUNTER         1.50   ____
CAN B3G3F DSP #3      1.50   ____
CAN CAP DISP          1.50   ____
CAN CTN LTRS D#7      7.50   20__
CAN FLASH LT D#2      1.50   ____
CAN HP LTR D#7        1.50   ____
CAN TUMBLER D #7      1.50   ____
DOR $.50 VPR          0.50   12__
DORAL $ .25  VPR      0.25   ____
DORAL $ .35  VPR      0.35   ____
DORAL $ .40  VPR      0.40   ____
DORAL $ .45  VPR      0.45   ____
DORAL $2.00  VPR      2.00   ____
DORAL $2.50  VPR      2.50   ____

ENTER - CALCULATE AMOUNT                PF8  - NEXT SCREEN
  PF1 - PAYMENT SYSTEM SELECTION MENU   PF12 - MAKE PAYMENT
```

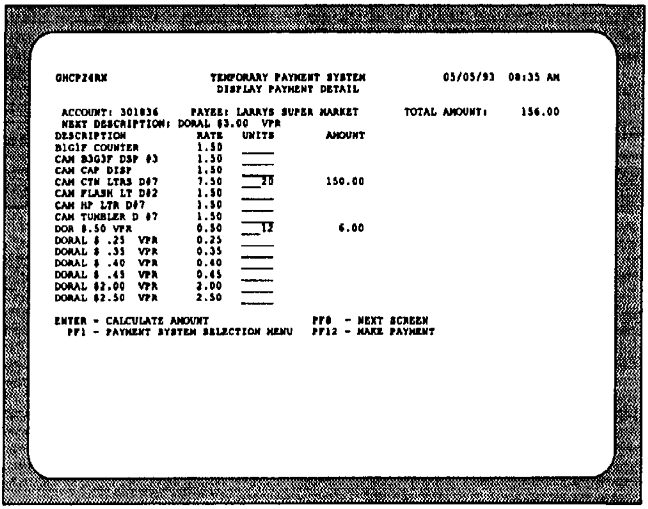
6. Utilizing the documentation retrieved previously, input appropriate quantities next to the appropriate promotions and press [ENTER].

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7315

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. This screen tabulates the information just placed into the system, generating a total $ amount for check. Review and press [PF12] if accurate.



GHCP24RX TEMPORARY PAYMENT SYSTEM 05/05/93 08:35 AM
DISPLAY PAYMENT DETAIL

ACCOUNT: 301836 PAYEE: LARRYS SUPER MARKET TOTAL AMOUNT: 156.00
NEXT DESCRIPTION: DORAL $3.00 VPR

DESCRIPTION	RATE	UNITS	AMOUNT
BIGIF COUNTER	1.50		
CAM BJGJF DSP #3	1.50		
CAM CAP DISP	1.50		
CAM CTN LTRS D#7	7.50	20	150.00
CAM FLASH LT D#2	1.50		
CAM HP LTR D#7	1.50		
CAM TUMBLER D #7	1.50		
DOR $.50 VPR	0.50	12	6.00
DORAL $ .25 VPR	0.25		
DORAL $ .35 VPR	0.35		
DORAL $ .40 VPR	0.40		
DORAL $ .45 VPR	0.45		
DORAL $2.00 VPR	2.00		
DORAL $2.50 VPR	2.50		

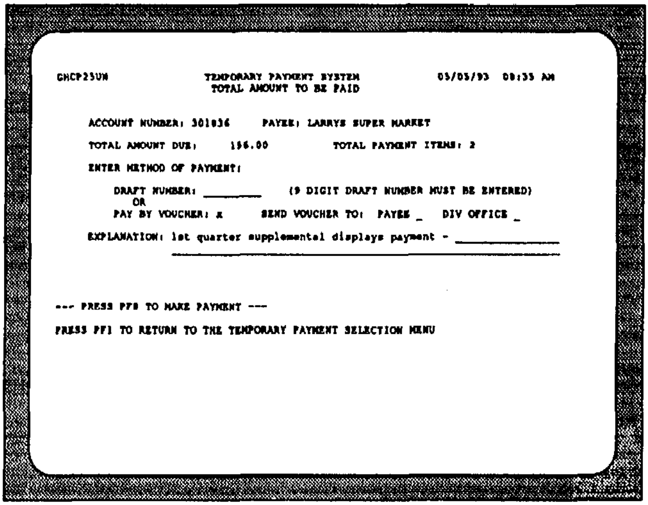
ENTER - CALCULATE AMOUNT PF8 - NEXT SCREEN
PF1 - PAYMENT SYSTEM SELECTION MENU PF12 - MAKE PAYMENT

51846 7316

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. As in Office Expenses, it is necessary to write a free form explanation of the items paid for. Doublecheck the accuracy of the payee and the amount. Select the destination of the voucher — payee's business or Operations Unit. Press [PF8] to make the payment.



9. This screen highlights all information just entered. Press [ENTER].

10. Press [ENTER] to obtain a *Temporary Display Payment Detail Report* for this payment. This is required documentation to attach to other associated documents.

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7317

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Distributor Assist/VAPs

These programs are similar in nature. RJR personnel, in an effort to expedite delivery and improve market penetration, often request direct accounts to perform various packing and shipping functions relative to promotional displayed.

- **DISTRIBUTOR ASSIST PROGRAMS** - In these cases, the direct account has sole responsibility for the selling, packing, and placement of promotional displays in low-volume calls they service. For this, RJR has agreed to pay these direct accounts $12.00 for each display placed.

- **VALUE-ADDED PROGRAMS** - Often larger in scope than Distributor Assist programs, this program differs in two major areas:

  - RJR personnel sell retail accounts on their blanket acceptance of monthly promotional displays. These authorizations are forwarded to the direct account — the wholesaler's responsibility is only to pack and ship the display — direct accounts do not sell this program, RJR personnel do.

  - The Value-Added Program follows different payment guidelines

    - For Package Premium and BSGSF displayed - $28.00/case
    - For Carton Premium displays - $15.00/case
    - For Carton Coupon displays - $10.00/case
    - For B1G1F displays - $9.00 case
    - A variable amount is also available - consult with Region Operations Manager for details on Region/Sales Area guidelines

51846 7318

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

PAYMENT SYSTEMS

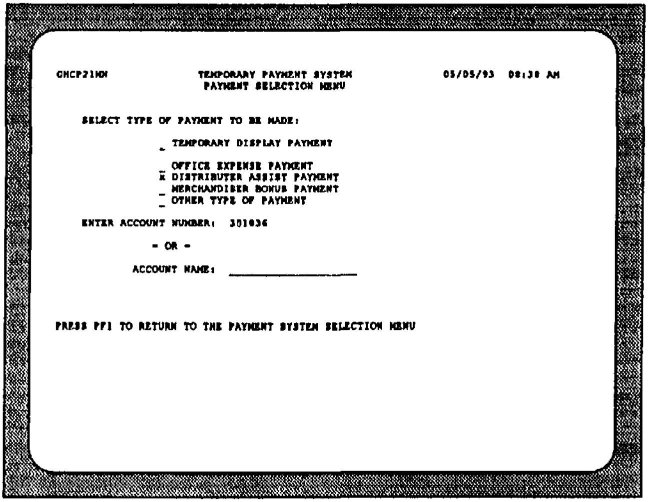
Obtaining Proper Documentation (VAP/DAP)

Normally, the Direct Account will submit invoice detailing display/case quantities utilized for program.

- *Note:* Because Promotion Coordinator is charged with display programs, this person should have instructed the Direct Account on the proper format for submission of these invoices.

Requesting VAP/DAP Payments

1. Select *Payment Systems* from the SIS Main Menu and press [ENTER].
2. Select *Temporary Payment Systems* and press [ENTER].
3. Select *Distributor Assist Payment.*

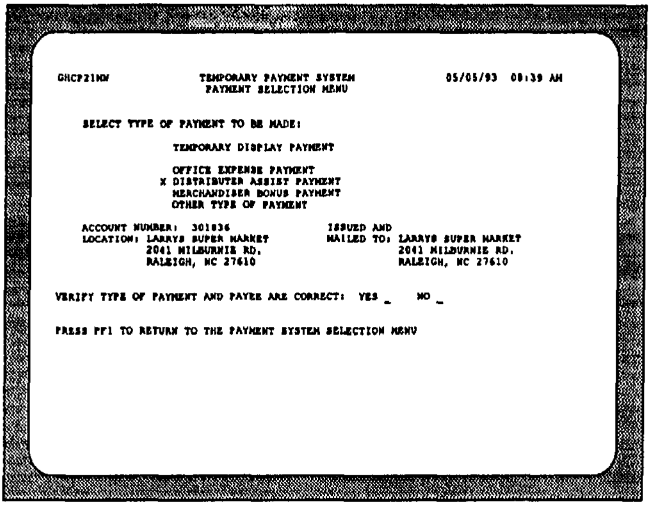


- As with Temporary Display Payments, it is necessary to input the account number or name of the direct account in question.
- Press [ENTER].

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. This screen will indicate location and mail-to address of payee. Verify whether information is correct by placing an "X" in the appropriate blank and press [ENTER].



```
GHCP21NW            TEMPORARY PAYMENT SYSTEM           05/05/93  08:39 AM
                     PAYMENT SELECTION MENU

    SELECT TYPE OF PAYMENT TO BE MADE:

                   TEMPORARY DISPLAY PAYMENT

                   OFFICE EXPENSE PAYMENT
                 X DISTRIBUTER ASSIST PAYMENT
                   MERCHANDISER BONUS PAYMENT
                   OTHER TYPE OF PAYMENT

    ACCOUNT NUMBER:  301836             ISSUED AND
    LOCATION: LARRYS SUPER MARKET       MAILED TO: LARRYS SUPER MARKET
              2041 MILBURNIE RD.                   2041 MILBURNIE RD.
              RALEIGH, NC 27610                    RALEIGH, NC 27610

VERIFY TYPE OF PAYMENT AND PAYEE ARE CORRECT:  YES _    NO _

PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

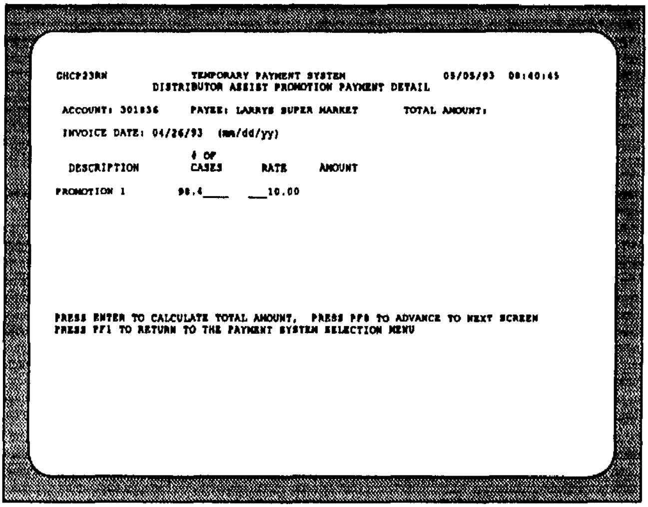
5. If payment is for a Distributor Assist Program payment, skip to step 11. For Value-Added Program Payments, place an "X" next in the Promotion blank and press [ENTER].

51846 7320

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. Type in the date of the Direct Account invoice in hand and the number of cases of product utilized in the promotion.



```
CHCP23RN          TEMPORARY PAYMENT SYSTEM              05/05/93  08:40:45
             DISTRIBUTOR ASSIST PROMOTION PAYMENT DETAIL

 ACCOUNT: 301836    PAYEE: LARRYS SUPER MARKET      TOTAL AMOUNT:

 INVOICE DATE: 04/26/93  (mm/dd/yy)

                      # OF
  DESCRIPTION         CASES     RATE     AMOUNT

PROMOTION 1          98.4____  ___10.00



PRESS ENTER TO CALCULATE TOTAL AMOUNT,  PRESS PF8 TO ADVANCE TO NEXT SCREEN
PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

- SC must be aware of the type of promotion worked due to the varying payment scheduled for different promotions.

- It may be necessary to consult with the Promotion Coordinator to determine the number of cartons packed per display. Often, Direct Accounts submit their invoice in terms of the number of displays packed, instead of cases. Utilize this formula when determining the number of cases:

# of displays x # of cartons per display = total # of cartons

Total # of cartons / 60 = Total cases

◆ *Note:* The system will allow for an entry with up to two decimal points to be entered (i.e., 45.25 cases).

51846 7321

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Press [ENTER] to calculate Total $ amount.

```
GHCP23RN          TEMPORARY PAYMENT SYSTEM               05/05/93  08:41:17
            DISTRIBUTOR ASSIST PROMOTION PAYMENT DETAIL

 ACCOUNT: 301836    PAYEE: LARRYS SUPER MARKET      TOTAL AMOUNT:     984.00

 INVOICE DATE: 04/26/93  (mm/dd/yy)

                      # OF
 DESCRIPTION          CASES      RATE     AMOUNT

PROMOTION 1         ___98.40  ___10.00     984.00




PRESS ENTER TO CALCULATE TOTAL AMOUNT,  PRESS PF8 TO ADVANCE TO NEXT SCREEN
PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

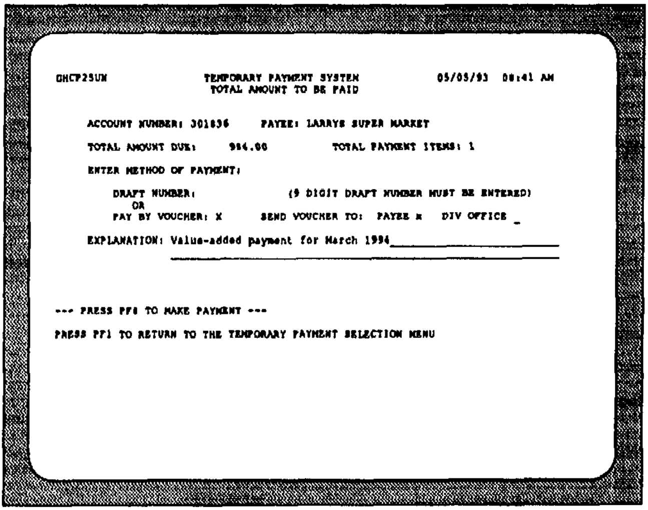
7. Verify the total cases and $ amount for accuracy. Press [PF8] to continue.

51846 7322

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

8. This screen highlights key data just entered. As with all TPS payments, the SC should note a free-form explanation of the payment. Vouchers can be sent to either payee or Operations Unit. Simply place an "X" next to the appropriate mail-to location. Press [PF8] to make the payment.



```
DHCP25UN              TEMPORARY PAYMENT SYSTEM           05/05/93  08:41 AM
                       TOTAL AMOUNT TO BE PAID

    ACCOUNT NUMBER: 301836      PAYEE: LARRYS SUPER MARKET

    TOTAL AMOUNT DUE:     984.00         TOTAL PAYMENT ITEMS: 1

    ENTER METHOD OF PAYMENT:

        DRAFT NUMBER:               (9 DIGIT DRAFT NUMBER MUST BE ENTERED)
           OR
        PAY BY VOUCHER: X      SEND VOUCHER TO:  PAYEE x   DIV OFFICE _

    EXPLANATION: Value-added payment for March 1994


--- PRESS PF8 TO MAKE PAYMENT ---

PRESS PF1 TO RETURN TO THE TEMPORARY PAYMENT SELECTION MENU
```

51846 7323

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

9. This screen summarizes all data just processed. Press [ENTER].

```
GHCP2SUM            TEMPORARY PAYMENT SYSTEM           05/05/93  08:42 AM
                   DISPLAY VOUCHER INFORMATION

    ACCOUNT NUMBER: 301836     PAYEE: LARRYS SUPER MARKET

    TOTAL AMOUNT DUE:     984.00          TOTAL PAYMENT ITEMS: 1

       PAY BY VOUCHER

       SEND CHECK TO:  PAYEE X   DIV OFFICE

       VOUCHER NUMBER ASSIGNED: 15000924

    EXPLANATION: VALUE-ADDED PAYMENT FOR MARCH 1994


VOUCHER PAYMENT HAS BEEN RECORDED

PAYMENT REPORT WILL PRINT AT DESTINATION: XXXX
PRESS PF1 TO RETURN TO TEMPORARY PAYMENT SELECTION MENU
```

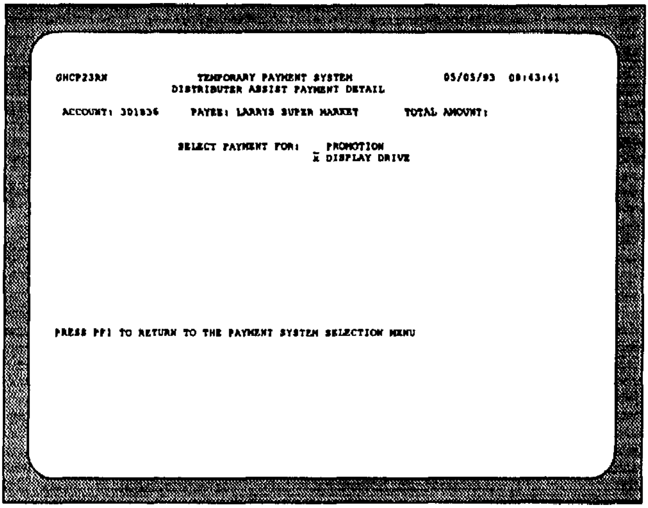
10. Verify the print location of the *Temporary Display Payment Detail Report* and press [ENTER]. This report must be attached to the Direct Account invoice as documentation.

51846 7324

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

11. For Distributor Assist Program payments, place an "X" next to the *Display Drive* blank. Press [ENTER].



51846 7325

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

12. Input the date of the direct account invoice in hand and the number of displays noted in the document. Press [ENTER] to calculate the $ amount.

```
GHCP23RN              TEMPORARY PAYMENT SYSTEM              05/05/93  08:44:00
              DISTRIBUTOR ASSIST DISPLAY DRIVE PAYMENT DETAIL

 ACCOUNT: 301836     PAYEE: LARRYS SUPER MARKET       TOTAL AMOUNT:

 INVOICE DATE: 04/26/93  (mm/dd/yy)

                        # OF
  DESCRIPTION         DISPLAYS     RATE     AMOUNT

 TEST2                85_____   ___10.00




PRESS ENTER TO CALCULATE TOTAL AMOUNT,  PRESS PF8 TO ADVANCE TO NEXT SCREEN
PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

51846 7326

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

13. Verify the $ amount, payee and number of displays and press [PF8] if accurate.

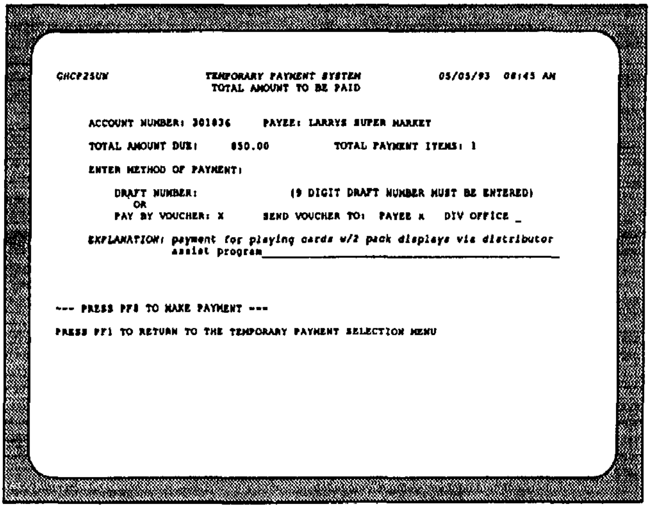
```
GHCP23RN             TEMPORARY PAYMENT SYSTEM             05/05/93  08:45:30
              DISTRIBUTOR ASSIST DISPLAY DRIVE PAYMENT DETAIL

 ACCOUNT: 301836    PAYEE: LARRYS SUPER MARKET       TOTAL AMOUNT:     $50.00

 INVOICE DATE: 04/26/93  (mm/dd/yy)

                      # OF
  DESCRIPTION       DISPLAYS    RATE     AMOUNT

TEST2              ___05.00  ___10.00    $50.00




PRESS ENTER TO CALCULATE TOTAL AMOUNT,  PRESS PF8 TO ADVANCE TO NEXT SCREEN
PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

51846 7327

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

14. This screen highlights key data just entered. As with all TPS payments, the SC should note a free-form explanation of the payment. Vouchers can be sent to either payee or Operations Unit. Simply place an "X" next to the appropriate mail-to location. Press [PF8] to make the payment.



15. This screen summarizes all data just processed. Press [ENTER].

16. Verify the print location of Temporary Display Payment Detail Report and press [ENTER]. This report must be attached to the Direct Account invoice as documentation.

51846 7328

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MERCHANDISER BONUS PAYMENTS

The Systems Coordinator is responsible for the processing of Merchandiser Bonus Payments. These payments are made to retail and chain headquarter accounts in return for these accounts providing RJR with a significant advantage in either package or carton fixture presence.

- The SC may request Merchandiser Bonus Payments for amounts of $75,000 or less.
- Bonus payments exceeding $75,000 require voucher submission through Sales Finance.

Requesting Bonus Payments Via TPS

1. SC receives signed carton and/or package bonus contracts from a sales representative or manager.
2. With this contract in hand, the SC accesses the TPS system in SIS.
3. At the *Temporary Payment Selection* menu, type "X" next to TEMPORARY PAYMENTS and press [ENTER].
4. Select MERCHANDISER BONUS PAYMENT, enter the account number of account to whom bonus is to be paid, and press [ENTER].

```
GHCP21MN            TEMPORARY PAYMENT SYSTEM          07/30/93  08:26 AM
PAYMENT SELECTION MENU

SELECT TYPE OF PAYMENT TO BE MADE:

x TEMPORARY DISPLAY PAYMENT

_ OFFICE EXPENSE PAYMENT
_ DISTRIBUTER ASSIST PAYMENT
_ MERCHANDISER BONUS PAYMENT
_ OTHER TYPE OF PAYMENT

ENTER ACCOUNT NUMBER:  629820

- OR -

ACCOUNT NAME: ________________


PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

51846 7329

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The next screen shows the account name/address data for the account selected. Verify the account chosen is correct, type "X" next to "Yes", and press [ENTER].

   - If the account is incorrect, place an "X" next to "No", and the system will automatically return you to the original payment screen.

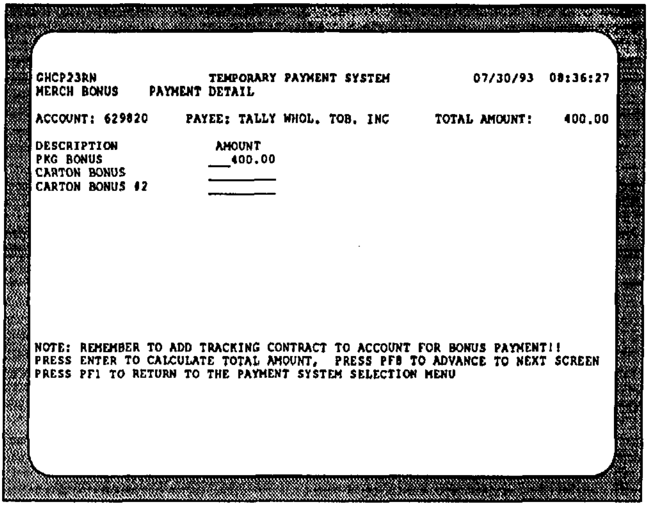
```
GHCP21MN              TEMPORARY PAYMENT SYSTEM          07/30/93  08:31 AM
PAYMENT SELECTION MENU

SELECT TYPE OF PAYMENT TO BE MADE:

X TEMPORARY DISPLAY PAYMENT

OFFICE EXPENSE PAYMENT
DISTRIBUTER ASSIST PAYMENT
MERCHANDISER BONUS PAYMENT
OTHER TYPE OF PAYMENT

ACCOUNT NUMBER:  629820              ISSUED AND
LOCATION: TALLY WHOL. TOB. INC       MAILED TO: TALLY WHOL. TOB. INC
60 HAMPSHIRE STREET                   P. O. BOX 7, DTS
PORTLAND, ME 04112                    ATTN:CIGARETTE BUYER
PORTLAND, ME 04112

VERIFY TYPE OF PAYMENT AND PAYEE ARE CORRECT:  YES _    NO _

PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

51846 7330

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6. After verifying the account chosen is correct, the system provides a prompt to enter the dollar amount of the package/carton bonuses being paid.



```
CHCP23RN              TEMPORARY PAYMENT SYSTEM          07/30/93  08:36:27
MERCH BONUS     PAYMENT DETAIL

ACCOUNT: 629820     PAYEE: TALLY WHOL. TOB. INC     TOTAL AMOUNT:    400.00

DESCRIPTION             AMOUNT
PKG BONUS             ___400.00
CARTON BONUS          _________
CARTON BONUS #2       _________

NOTE: REMEMBER TO ADD TRACKING CONTRACT TO ACCOUNT FOR BONUS PAYMENT!!
PRESS ENTER TO CALCULATE TOTAL AMOUNT,  PRESS PF8 TO ADVANCE TO NEXT SCREEN
PRESS PF1 TO RETURN TO THE PAYMENT SYSTEM SELECTION MENU
```

- Since bonus payments are variable one-time items, the amount is obtained from the contract on hand.
- Package contract bonus payments normally run from $0 - $500 per store. Carton contract bonus payments normally run from $0 - $1500 per store.
- Amounts that appear excessive should be discussed with the Region Operations Manager before processing.
- A reminder is found at the bottom of this screen to enter bonus tracking contracts.

51846 7331

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7. Press [ENTER] to calculate the total payment and press PF8 to continue to the next screen.

8. This screen requires an explanation of the payment being made. Type in the explanation and press [ENTER].

```
CHCP25UN            TEMPORARY PAYMENT SYSTEM          07/30/93  08:37 AM
TOTAL AMOUNT TO BE PAID

ACCOUNT NUMBER: 629820      PAYEE: TALLY WHOL. TOB. INC

TOTAL AMOUNT DUE:      400.00          TOTAL PAYMENT ITEMS: 1

ENTER METHOD OF PAYMENT:

DRAFT NUMBER:               (9 DIGIT DRAFT NUMBER MUST BE ENTERED)
OR
PAY BY VOUCHER: X     SEND VOUCHER TO:  PAYEE _   DIV OFFICE _

EXPLANATION: ________________________________________________
_____________________________________________________


--- PRESS PF8 TO MAKE PAYMENT ---

PRESS PF1 TO RETURN TO THE TEMPORARY PAYMENT SELECTION MENU
```

9. This screen requires the SC to designate whether the check should be sent directly to the payee OR back to the Division. Type an "X" as appropriate.

   - Press PF8 to request payment approval, which will initiate an *Approval Requested Report* to Sales Finance where the final approval is made before check is issued.

10. Press [ENTER] twice to receive printed Detail payment report. Retain for files.

11. Type "TRACKING CONTRACT".

Tracking Contracts

Each bonus is paid to an account in return for their maintenance of RJR fixtures over a period of time. It is necessary to enter a tracking contract for each account paid a bonus. This contract remains in SIS and on each Rep's Master List until the time period the bonus covers expires.

Example:
If Joe's Market receives a $1000 carton bonus for maintaining RJR carton fixtures exclusively for three years, a tracking contract must be entered to inform the system and RJR personnel of this commitment. If the account

51846 7332

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

chooses to change fixtures after one year, RJR personnel must ensure a prorated portion of the $1000 bonus is returned. A tracking contract will ensure RJR personnel are aware of the time period the bonus payments are in effect.

The tracking contracts are for use by the Operations Unit to enter SIS tracking contracts for all bonus payments made as follows:

- Previously by paper voucher
- Currently via TPS system
- Currently via paper voucher due to amount of bonus exceeding $75,000

To enter tracking contracts, utilize contract screens as follows:

1. Receive signed carton and/or package bonus contracts from account. Enter the carton and/or package bonus tracking contracts in the account with beginning and ending dates (if applicable). The options are:

Bonus	*Type*	*Plan*	*Rate*
Carton	Ctn Mer Bonus	Bonus	0.00
Package	Pkg Mer Bonus	Bonus	0.00

   If the account has previously received (via paper voucher) or is currently receiving a bonus for a combination of carton and package, enter a tracking contract for each type bonus. The bonus contracts must be entered as any other contract would for an account and will appear with a fixed zero rate on your Pay Register and Master List.

2. If you have previously requested a bonus payment for any of your accounts via paper voucher, do not request a second payment through TPS. You must, however, enter a tracking contract for those payments previously requested.

3. If you are currently requesting a bonus payment for any of your accounts via TPS (refer to "Merchandiser Bonus Payment System Payment Request Procedures - Section I"), or, if you are currently requesting a bonus payment via paper voucher because the bonus payment exceeds $75,000, you must enter a tracking contract at the time of payment request. If, for any reason, a bonus payment is not approved by Sales Finance, the tracking contracts must obviously be deleted.

4. The purpose of the tracking contracts is to enable the merchandising projected payment tracking report to project when bonus contracts are ending. The tracking contracts also provide a trail for the Pay Register to identify which accounts have been paid a bonus.

51846 7333

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7334

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 2
Pay Registers

51846 7335

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Summary

The Pay Register is a quarterly report that lists all accounts (Chain and Independent) for which the operating unit has payment responsibility.

The information contained in the Pay Register is extracted from the Master List (i.e., Account Number, Name, Territory, Address, Chain ID, Contracts, etc.) Any valid contract entered in SIS for payment will be extracted each quarter from the Master List and entered in the Pay Register System. The effective and ending dates of the contract will determine in which months of the quarter to post payment.

If a contract is effective for the 15th day for any given month, the payment will be made for the entire month. Otherwise, the payment will start on the 1st day of the subsequent month.

Preliminary Activities

Before Preliminary Pay Register is pulled, the SC should print a report of accounts in no-pay status, if any of the accounts have contracts. The no-pay must be lifted to appear on preliminary or be added to preliminary. Before a Final Pay Register can reflect the monies paid to accounts for contractual displays, a Preliminary Pay Register must be obtained and all payment authorized and approved. Because normal changes to contract payments are made via 7101's during the quarter, errors can occur due to gaps in submission of changes or entry of information. The objective of Preliminary Pay Registers is to ensure absolutely that every account receives the proper contractual payments due them based on their participation in RJR programs.

The Company will issue a yearly scheduled of pertinent dates. This Pay Register Schedule will be similar to the following:

1993 QUARTERLY CONTRACT PAY REGISTER SCHEDULE

ACTIVITY	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Last Day for Changes Prior to Extraction	3/26/93	6/25/93	9/24/93	12/31/93
Pay Register Extraction Date	3/27/93	6/26/93	9/25/93	1/1/94
Pay Register Available to Field	3/29/93	6/28/93	9/27/93	1/3/94
Field Sales Approval Dates:				
Week 1	4/1/93	7/8/93	9/30/93	1/6/94
Week 2	4/7/93	7/15/93	10/7/93	1/13/94
Week 3	4/15/93	7/22/93	10/14/93	1/20/94
Week 4	4/22/93	7/29/93	10/21/93	1/27/94
Customer Checks Data and Mailed:				
Week 1	4/5/93	7/12/93	10/4/93	1/10/94
Week 2-4	4/26/93	8/2/93	10/25/93	1/31/94

This example illustrates the flow of activities over time regarding Pay Register processing. The following steps will also indicate how Pay Registers are to be reviewed and administered.

51846 7336

Copyright © R.J. Reynolds Tobacco Company 1993

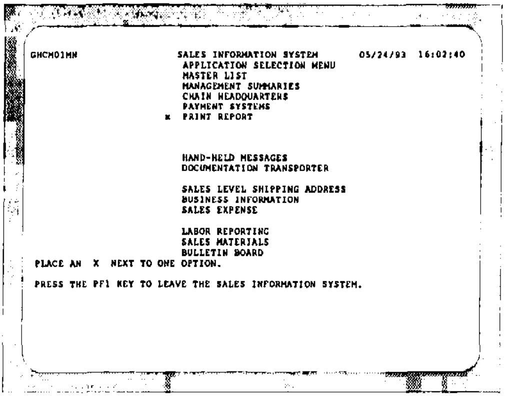
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

I. Approximately 1 month to 2 weeks prior to the Quarterly Pay Register Extraction date, the SC should notify all Region personnel that all changes to contract must be submitted and entered into the System by that extraction date.

- *Note:* This must be done to minimize any corrections that will have to be made after the Preliminary Pay Register has been pulled up. The more work done efficiently by Sales Reps prior to the extraction date, the fewer modifications that will need to be made later.

II. As soon as possible after the Extraction date has been reached, the SC should request Preliminary Pay Registers via the SIS system.

1. To request the Preliminary Pay Register, log on to SIS.



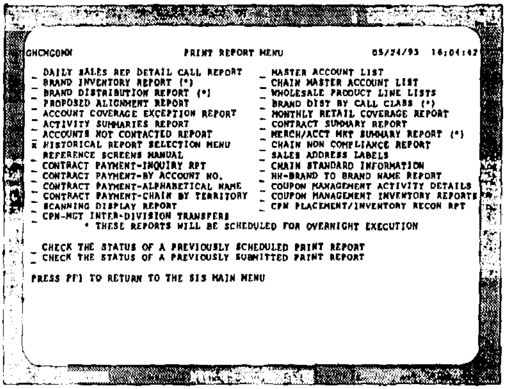
2. At the Application Selection Menu, type "X" in front of PRINT REPORT and press [ENTER].

3. Place an "X" beside Historical Report Selection Menu and press [ENTER].

51845 7337

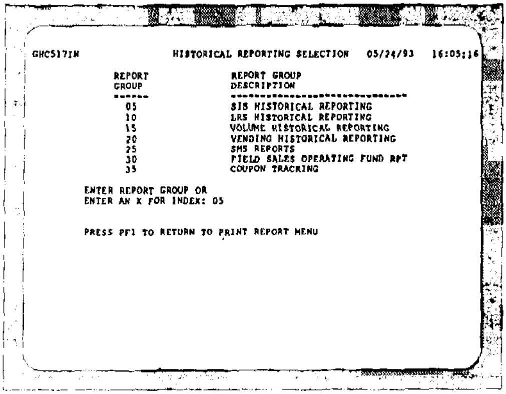
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



```
GHCHGOMN                 PRINT REPORT MENU                05/24/93  16:04:42

_ DAILY SALES REP DETAIL CALL REPORT     _ MASTER ACCOUNT LIST
_ BRAND INVENTORY REPORT (*)             _ CHAIN MASTER ACCOUNT LIST
_ BRAND DISTRIBUTION REPORT (*)          _ WHOLESALE PRODUCT LINE LISTS
_ PROPOSED ALIGNMENT REPORT              _ BRAND DIST BY CALL CLASS (*)
_ ACCOUNT COVERAGE EXCEPTION REPORT      _ MONTHLY RETAIL COVERAGE REPORT
_ ACTIVITY SUMMARIES REPORT              _ CONTRACT SUMMARY REPORT
_ ACCOUNTS NOT CONTACTED REPORT          _ MERCH/ACCT MKT SUMMARY REPORT (*)
x HISTORICAL REPORT SELECTION MENU       _ CHAIN NON COMPLIANCE REPORT
_ REFERENCE SCREENS MANUAL               _ SALES ADDRESS LABELS
_ CONTRACT PAYMENT-INQUIRY RPT           _ CHAIN STANDARD INFORMATION
_ CONTRACT PAYMENT-BY ACCOUNT NO.        _ HH-BRAND TO BRAND NAME REPORT
_ CONTRACT PAYMENT-ALPHABETICAL NAME     _ COUPON MANAGEMENT ACTIVITY DETAILS
_ CONTRACT PAYMENT-CHAIN BY TERRITORY    _ COUPON MANAGEMENT INVENTORY REPORTS
_ SCANNING DISPLAY REPORT                _ CPN PLACEMENT/INVENTORY RECON RPT
_ CPN-MGT INTER-DIVISION TRANSFERS
        * THESE REPORTS WILL BE SCHEDULED FOR OVERNIGHT EXECUTION

_ CHECK THE STATUS OF A PREVIOUSLY SCHEDULED PRINT REPORT
_ CHECK THE STATUS OF A PREVIOUSLY SUBMITTED PRINT REPORT

PRESS PF1 TO RETURN TO THE SIS MAIN MENU
```

4. At the Historical Reporting Selection screen, type 05 after ENTER REPORT GROUP OR...: and press [ENTER].



```
GHC517IN             HISTORICAL REPORTING SELECTION   05/24/93   16:05:16

            REPORT             REPORT GROUP
            GROUP              DESCRIPTION
            ------             ------------------------------
              05               SIS HISTORICAL REPORTING
              10               LRS HISTORICAL REPORTING
              15               VOLUME HISTORICAL REPORTING
              20               VENDING HISTORICAL REPORTING
              25               SHS REPORTS
              30               FIELD SALES OPERATING FUND RPT
              35               COUPON TRACKING

        ENTER REPORT GROUP OR
        ENTER AN X FOR INDEX: 05

        PRESS PF1 TO RETURN TO PRINT REPORT MENU
```

Copyright © R.J. Reynolds Tobacco Company 1993

51846 7338

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. At the SIS Historical Reporting screen, type 121 after ENTER REPORT NUMBER: and press [ENTER]. Repeat for 122. Preliminary Pay Register Reports will print at your location.

```
GHC5261N              SIS HISTORICAL REPORTING        05/24/93     16:07:30

              REPORT              REPORT
              NUMBER              DESCRIPTION
              ------              -----------------------------------
               120                TOP 25/BRAND OPPORTUNITY REPORT
               121                PRELIMINARY PAY REGISTER DETAIL
               122                PRELIMINARY PAY REGISTER TOTALS
               123                WEEKLY FINAL PAY REGISTER DETAIL
               125                QUARTERLY FINAL PAY REGISTER DETAIL
               126                QUARTERLY FINAL PAY REGISTER TOTALS
               127                SIS DIRECTORY OF CHAIN ACCOUNT
               130                ELECTRONIC SECURITY DEDUCTION REPT.
               132                ACCOUNTS PAID, NO CALL MADE REPORT
               134                CPR 'NO-PAY' ACCOUNT LIABILITY RPT
               135                DISTR. ASSIST PAYMENT SUMMARY RPT.
               137                LIST OF ACCOUNTS WITH MISSING TAXID
               141                MONTHLY RETAIL ACCOUNT COVERAGE RPT

         ENTER REPORT NUMBER: 121

         PRESS ENTER TO SCROLL
         PRESS PF1 TO RETURN TO HISTORICAL REPORTING SELECTION
```

III. Once Preliminary Pay Registers have been printed, each should be sent to the appropriate sales representative or manager. These personnel are responsible for reviewing each account's payment detail for accuracy and either approving the account "as is", or making corrections and authorizing payments as corrected. Instructions should be attached to each Preliminary and should indicate the following:

- The sales rep or manager should use a red pen when reviewing register
- After reviewing each account, personnel should write OK in margin next to account is all information is correct.
- If any portion of the account is incorrect, the sales rep must:
  - Use red pen to indicate correct information ON PAY REGISTER
  - Submit 7101 reflecting the changes
    - *Note:* 7101 submission is essential to permanently make changes

51846 7339

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- Once all accounts have been reviewed and corrected if necessary, the employee should sign and return the Preliminary Pay Register by the date indicated on the instruction sheet.
  - The SC and Region Operations Manager should determine the approval date for the Region. Utilize the Pay Register calendar to view options.

IV. As each Preliminary Pay Register is received, the SC should make any adjustments to each and approve Preliminary Pay Registers via Payment Systems in SIS. Approval of Independent Pay Register can only be done once all territories have been received, reviewed and any changes entered for any given Division.

- *Note:* The following instructions detail manipulation of the Payment Systems Pay Register screens — 7101 entry and Contract maintenance, while a critical part of the approval process, is not referred to in these pages. Please read sections on these topics for instructions.

51846 7340

Copyright © R.J. Reynolds Tobacco Company 1993

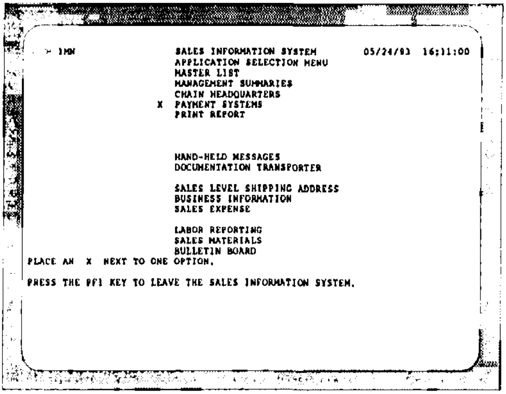
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Adjusting Pay Chain Registers

This screen gives the SC two options when adjusting Pay Registers:

- Chains with Division responsibility
- Independents

1. At the SIS Main Menu, type an "X" beside PAYMENT SYSTEMS and press [ENTER].

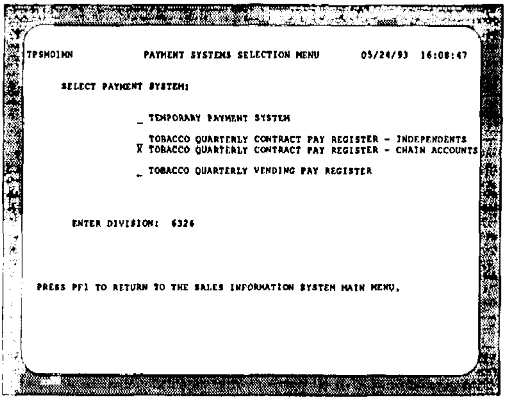


2. At the Payment Systems Selection Menu, type "X" in front of the TOBACCO QUARTERLY CONTRACT REGISTERS - CHAIN ACCOUNTS.

51846 7341

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



3. Press [TAB] and enter the Division number (if not shown) of the accounts you wish to view and press [ENTER].

51846 7342

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. At the *Chain IDs With Payment Responsibility* screen, type "X" in front of the Chain ID number of the specific account you wish to view and press [ENTER].

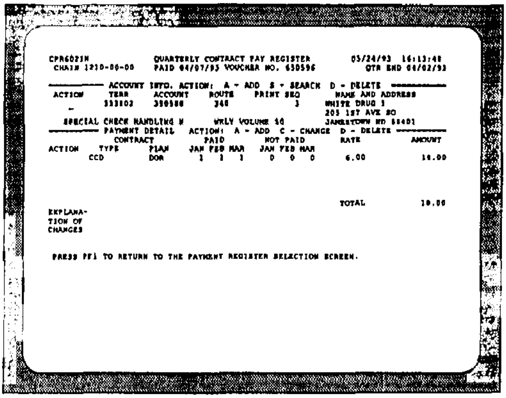
```
CPR6101N        CHAIN ID'S WITH PAYMENT RESPONSIBILITY    05/24/93  16:11:55
                          IN DIVISION  6326

             CHAIN ID           NAME                  APPROVAL DATE
             1210 00 00    WHITE DRUG ENTERPRIS         04/06/93
          _  1426 00 00    BILL'S SUPERETTE             04/06/93
          X  1480 00 00    BYERLY'S                     04/19/93
             1776 00 00    THRIFTY DRUG H.Q.            04/06/93
          _  1777 00 00    TOBACCO ROAD                 04/19/93
          _  3865 00 00    Q MIDWEST, INC.              04/06/93
          _  4185 00 00    TOWN & COUNTRY FOODS         04/19/93
          _  5044 00 00    COBORN'S LIQUOR INC.         04/08/93
          _  5183 00 00    BROOKS FOODS, INC            04/19/93
          _  5304 00 00    RON'S FOODS                  04/08/93
          _  9536 12 00    SUPER VALU RETAIL            04/19/93
          _
          _
          _
          _

ENTER AN  X  NEXT TO THE CHAIN ID OF THE CHAIN ACCOUNTS YOU WISH TO VIEW.

PRESS PF1 TO RETURN TO THE PAYMENT SYSTEMS SELECTION MENU
```

51846 7343

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. The following screen will be displayed.



```
CPRG021N          QUARTERLY CONTRACT PAY REGISTER          03/24/93  16:13:48
 CHAIN 1210-00-00  PAID 04/07/93 VOUCHER NO. 630596             QTR END 04/02/93
———— ACCOUNT INFO. ACTION:  A - ADD  S - SEARCH  D - DELETE ————
 ACTION    TERR     ACCOUNT    ROUTE    PRINT SEQ      NAME AND ADDRESS
          333102    390588      348            3     WHITE DRUG 3
   _                                                 205 1ST AVE SO
   SPECIAL CHECK HANDLING N      WKLY VOLUME 40      JAMESTOWN ND 58401
———— PAYMENT DETAIL   ACTION:  A - ADD  C - CHANGE  D - DELETE ————
            CONTRACT            PAID         NOT PAID        RATE          AMOUNT
ACTION    TYPE      PLAN    JAN FEB MAR   JAN FEB MAR
          CCD       DOR       1   1   1     0   0   0       6.00           18.00

                                                            TOTAL          18.00
EXPLANA-
TION OF
CHANGES

PRESS PF1 TO RETURN TO THE PAYMENT REGISTER SELECTION SCREEN.
```

Adjusting INFO Section

The *Quarterly Contract Pay Register* screen is divided into two sections. ACCOUNT INFO and PAYMENT DETAIL. This information comes from the Master List. If you wish to view each account, press [ENTER]. When you have viewed all accounts, the totals screen will appear.

In the ACCOUNT INFO section, you have three options:

- A - ADD (i.e., add an account to the Pay Register)
- S - SEARCH (i.e., search for a specific store/account or display the Totals screen for the Chain)
- D - DELETE (i.e., delete a store/account from the Pay Register)

51846 7344

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Add Option

To add a Chain store account not on the Pay Register:

1. At the Quarterly Contract Pay Register screen, type "A" under ACTION.

2. Under ACCOUNT, type the account number of the store being added and press [ENTER]. (The account must be on the Master List.) If the account cannot be added due to invalid or no tax ID number, the tax ID must first be added via 7101. The print screen must be obtained and this information with a cover letter asking to lift the no-pay status must be faxed to Winston-Salem within 3-4 days. The no pay status will be lifted and the account can then be added.

   If an error message occurs (e.g., ACCOUNT ALREADY EXISTS ON PAY REGISTER), you must determine which Division the account is in and remove it from the Independent Pay Register before adding it and any appropriate contracts to the Chain Pay Register.

   This type error usually occurs when a Chain Headquarter screen does not allow for a certain contract to be paid at Chain level.

   The next screen will display the NAME and ADDRESS of the Store/Account you are adding. If the account is in your Division, the Territory will be displayed as the correct territory on the Master List. If the account you are adding is not in your Division, the territory will consist of your Division number and 00. (You are not allowed to change the territory number.)

3. To add contract payment information, see page 2-12.

   - *Note:* When adding a store to the Pay Register, the contracts that are effective for this store are not extracted from the Master List. For payments to be made, each contract must be added to the Pay Register along with the number of units and rate.

Search Option

To search for a specific chain store/account, display the Adjust screen for the chain, or display the totals screen for the chain:

1. At the *Quarterly Contract Pay Register* screen, type "S" under ACTION.

2. Under ACCOUNT, overkey the account number you want and press [ENTER]. The screen will display Pay Register information for that store/account. (An error message will appear if the store/account is not part of the Chain.)

51846 7345

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- *Note:* If the store appears with DELETED under the account number, the store has been deleted from the Master List during the quarter. However, payment is still to be made for the months the store was on the Master List.

3. To display the Adjust screen, type "S" under ACTION and press [ENTER].
4. Under ACCOUNT, type ADJUST and press [ENTER].
5. To display the Totals screen (used to display totals for the entire chain or approve the chain for payment), type "S" in the ACTION field.
6. Under ACCOUNT, type TOTALS and press [ENTER].

■ **Delete Option**

To delete a specific chain store/account:

1. At the Quarterly Contract Pay Register screen, type "S" in the ACTION field.
2. Under ACCOUNT, overkey the current number with the one you want and press [ENTER]. The screen will display Pay Register information for that store/account. (An error message will appear if the store/account is not part of the chain.)
3. Type "D" under ACTION and press [ENTER]. This store and any payments to the store will be deleted from the Pay Register. (However, the store will not be deleted from the Master List.)

Special Check Handling

Special check handling instructions which cover check destination, are taken from Chain Headquarters Information at Pay Register generation. These instructions may be changed by using the Adjust screen.

1. At the *Quarterly Contract Pay Register* screen, type "S" under ACTION.
2. Under ACCOUNT, type ADJUST and press [ENTER].
3. Search the Adjust screen for the Chain you wish to change (see search option).
4. After SPECIAL CHECK HANDLING, overkey with "Y" to mail the check to the Division Office or "N" to mail the check directly to the account. Then press [ENTER].

- *Note:* If the address shown on the Pay register is incorrect, use the SPECIAL CHECK HANDLING area to request that the check be mailed to the

51846 7346

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Division Office for hand delivery. However, ensure you make the address correction to the Master List.

Payment Detail Section

In the PAYMENT DETAIL section, you may select one of three options:

- A - ADD
- C - CHANGE
- D - DELETE

■ **Add Option**

To add a contract payment to a chain store:

1. Search for the particular Chain store for which the contract needs to be added (see search option).
2. At the Quarterly Contract Pay Register screen, type "A" under ACTION (left column) on the first available blank line or press PF2 to add another set of blank lines.
3. Enter a valid contract type and plan.
4. Type the number of units to be paid for each month.
5. If the contract type/plan is a variable-rate contract, enter the dollar amount of the contract. For variable-rate contracts, a "V" will be shown following the rate. For fixed-rate contracts, the rate is determined by the system.
6. The total amount of the payment will be automatically calculated and appear on the next screen. At the EXPLANATION OF CHANGES field, type the reason for the addition and press [ENTER]. The screen will show the added contract information.

■ **Change Option**

The Change option can only be used for payments that appear on the Pay Register. You are allowed to change only the number of units to be paid and the rate of a variable-rate contract. If the contract type/plan is incorrect, the contract must be deleted (see Delete option) and the correct contract type/plan added (see Add option).

To change a Chain contract payment:

1. Search for the particular Chain store for which the contract needs to be change (see Search option).

51846 7347

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. At the Quarterly Contract Pay Register screen, type "C" under ACTION beside the contract type/plan you wish to change.

3. Move the cursor to the units or rates field you wish to change and type the correct number of the units or rate.

4. At the EXPLANATION OF CHANGES field, type the reason for the change and press [ENTER]. The screen will show the change contract information.

- **Delete Option**

Deleting a contract type/plan has the same effect as changing the number of units to zero. However, if the unit are zeroed, the contract type/plan is displayed with a total of zero. If the contract type/plan is deleted, the Pay Register appears as if the contract never existed.

To delete a chain store contract/plan:

1. Search for a particular chain store for which the contract needs to be deleted (see search option).

2. At the *Quarterly Contract Pay Register* screen, type "D" under ACTION beside the contract type/plan you wish to delete.

3. At the EXPLANATION OF CHANGES field, type the reason for the deletion and press [ENTER]. The CONTRACT/PLAN will be deleted.

Pay Register Approval for Chain Accounts Under Division Responsibility

1. At the *Quarterly Contract Pay Register* screen, type "S" under ACTION.

2. Under ACCOUNT, type TOTALS and press [ENTER]. (You must use the Totals screen because payments for Chain accounts cannot be approved individually by store.)

3. To approve payments, type "Y" under ACTION and press [ENTER].

4. On the next screen, press [ENTER] to confirm the approval. APPROVED will be displayed at the top of the page.

   ◆ Note: After approving payments, no additional changes or unapprovals are allowed. If the Pay Register must be unapproved, contact Winston-Salem.

51846 7348

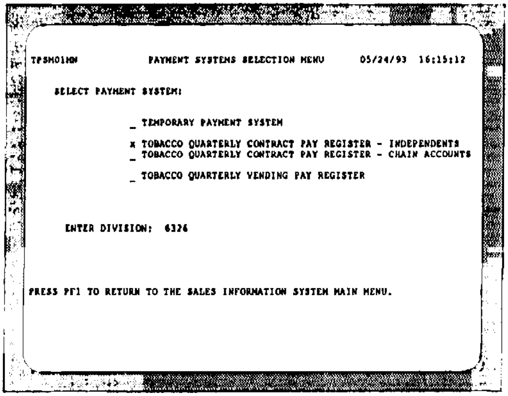
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Pay Register Adjustments for Independent Accounts

To access the Contract Pay Register for Independent accounts:

1. Log on to SIS.
2. At the Application Selection Menu, type "X" beside PAYMENT SYSTEMS and press [ENTER].
3. At the Payment Systems Selection Menu, type "X" in front of TOBACCO QUARTERLY CONTRACT REGISTER — INDEPENDENTS.



4. Press [TAB] and enter the Division number (if not shown) of the accounts you wish to view and press [ENTER].

ACCOUNT INFO Section

Account information for independent stores consists of standard information from the Master List.

In the ACCOUNT INFO section, you have three options:

- A - ADD
- S - SEARCH
- D - DELETE

518406 7349

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Add Option

To add an Independent store account not on the Pay Register:

1. At the *Quarterly Contract Pay Register* screen, type "A" under ACTION.

2. Under ACCOUNT, type the account number of the store being added and press [ENTER]. (The account must be on the Master List.) If the account cannot be added due to invalid or no tax ID number, the tax ID must first be added via 7101. A print screen must be obtained and this information with a cover letter asking to lift the no-pay status must be faxed to Winston-Salem within 3-4 days. The no pay status will be lifted and the account can then be added.

3. To add the contract payment information, see page 2-16.

   - *Note:* When adding a store to the Pay Register, the contracts that are effective for this store are not extracted from the Master List. For payments to be made, each contract must be added to the Pay Register, along with the number of units and rate.

Search Option

The Search Option is used to search for a specific independent store/account or to display the Totals screen for the independent accounts for the entire Division.

To search for a specific independent store/account on the Pay Register:

1. At the Quarterly Contract Pay Register screen, type "S" under ACTION and press [ENTER].

2. Under ACCOUNT, overkey the account number you want and press [ENTER]. The screen will display Pay Register information for that store/account.

   - *Note:* If the store appears with DELETED under the account number, the store has been deleted from the Master List during the quarter. However, payment is still to be made for the months the store was on the Master List.

51846 7350

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

To obtain independent totals for the entire Division:

1. Type "S" in the ACTION field.
2. Under ACCOUNT, type TOTALS and press [ENTER].

   ◆ *Note:* The Totals screen is used to display Division totals or approve the Division for payment.

■ **Delete Option**

To delete an independent store/account from the Pay Register:

1. Search for the store/account you wish to delete (see Search Option). Account detail information will appear on the screen.
2. Type "D" under ACTION and press [ENTER]. This store and any payments to the store will be deleted from the Pay Register. However, the store will not be deleted from the Master List.

PAYMENT DETAIL Section

In the Payment Detail section, you may select one of three options:

- A - ADD
- C - CHANGE
- D - DELETE

■ **Add Option**

To add a contract payment to an independent store:

1. At the *Quarterly Contract Pay Register* screen, type "A" under ACTION on the first blank line.
2. Enter a valid contract type and plan.
3. Type the number of units to be paid for each month.
4. If the contract type/plan is a variable-rate contract, enter the dollar amount of the contract. For variable-rate contracts, a "V" will be shown following the rate. For fixed-rate contracts, the rate is determined by the system.
5. The total amount of the payment will be automatically calculated and appear on the next screen. At the EXPLANATION OF CHANGES field, type the reason for the addition and press [ENTER]. The screen will show the added contract information.

51846 7351

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

■ **Change Option**

The change option can only be used for payments that appear on the Pay Register. You are allowed to change only the number of units to be paid and the rate of a variable rate contract. If the contract type/plan is incorrect, the contract must be deleted (see Delete option) and the correct contract type/plan added (see Add option).

To change an independent contract/payment:

1. At the *Quarterly Contract Pay Register* screen, type "C" under ACTION beside the contract type/plan you wish to change.
2. Move the cursor to the units or rates field you wish to change and type the correct number of units or rates.
3. At the EXPLANATION OF CHANGES field, type the reason for the change and press [ENTER]. The screen will show the changed contract information.

■ **Delete Option**

Deleting a contract type/plan has the same effect as changing the number of units to zero. However, if the units are zeroed, the contract type/plan is displayed with a total of zero. If the contract/type plan is deleted, the Pay Register appears as if the contract never existed.

To delete an independent contract/plan:

1. At the *Quarterly Contract Pay Register* screen, type "D" under ACTION beside the contract type/plan you wish to delete.
2. At the EXPLANATION OF CHANGES field, type the reason for the deletion and press [ENTER]. The contract/plan type will be deleted.

Pay Register Approval for Independent Accounts

To approve payments for independent accounts, you should use the totals screen. Payment for independent accounts cannot be approved individually by store.

■ **Approve Option**

To approve an independent payment:

1. At the *Quarterly Contract Pay Register* screen, type "S" under ACTION.
2. Under ACCOUNT, type TOTALS and press [ENTER].
3. To approve payments, type "Y" under ACTION and press [ENTER].

51846 7352

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. On the next screen, press [ENTER] to confirm the approval. APPROVED will be displayed at the top of the page.

   ◆ *Note:* After approving payments, *no* additional change or unapprovals are allowed. If a Pay Register *must* be unapproved, contact Sales Finance or SIS for assistance.

Final Pay Register

Upon completion of processing for preliminary Pay Registers, each should be filed, by Division for a period of one year. The Final Pay Register will be printed after approval has been submitted to the Disbursements Accounting Department in Winston-Salem. This report will show, by territory and by chain, the plans and amounts paid, the voucher number, and the date of payment. The report will also enable each manager to have data on every account for which he or she has payment responsibility.

The Final Pay Register should be sent to the sales rep for validation and retention. It is not necessary for the Operations Unit to maintain copies since all information can be obtained online.

Similarly, Final Pay Registers for Chains should be validated and retained by individual with Chain Headquarters responsibility.

TROUBLESHOOTING

Unapproving Quarterly Payments Report

After the second week of the quarter, approximately 3 weeks after the Preliminary Pay Register has been generated, a report listing independents and chain payments that have not be submitted for approval will be printed and sent to each Operations Unit. This report will continue to be printed until all payments for the quarter have been approved.

Unapproving Preliminary Pay Register

You can unapprove a Pay Register if a problem is discovered after a Preliminary Pay Register has been approved for a Division by calling Sales Finance or Dennis Jacobs (ext. 1760) in Winston-Salem. Pay Registers can only be unapproved before the weekly processing every Thursday night. For example, a Pay Register approved on 10/6/93 would have to be unapproved by 4:30 EST on 10/7/93. Otherwise, all vouchers approved for that Pay Register would be created the evening of 10/7/93.

Problems With RJRT Checks

Lost or Missing Checks

If a check is ever reported lost or missing, Disbursement Accounting in Winston-Salem should be notified using the "Check Status Inquiry" form. On receipt of this form, Disbursement Accounting will determine whether the check has cleared the bank.

51846 7353

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Stolen Checks

If Field Sales personnel and/or retailers have reported stolen checks, the Home Office in Winston-Salem must be notified *immediately*. Call Dennis Jacobs (ext. 1760) in Sales Finance with all information required on the Check Status Inquiry form.

Stop Payment

When a stop-payment must be made on a check, follow the same procedures as above for lost or missing checks. Replacement checks will not be issued for TPS checks. They should be requested again in TPS. Replacement checks will be issued for SIS contractual and Vending Pay Register checks.

Undeliverable or Returned Checks

When checks cannot be delivered or are returned from Disbursements Accounting, mark VOID across the check and send it to Dennis Jacobs in Winston-Salem, with a cover letter explaining why the check is being returned.

Occasionally, an error (under/over payment) will occur in an account. After approval of the Preliminary and issuance of check, the SC should set up a file, by Division, to contain notes relative to changes that must occur on NEXT pay register. Before approving next quarter's Pay Register, the SC can reference files for any outstanding issues.

Exception Payments

If a payment was not made to an account and the approved Pay Register has been electronically submitted to Winston-Salem, the preferred method for correcting this problem is to make an adjustment on the next quarterly Preliminary Pay Register. If this method is not feasible, a special request for payment must detail the following:

- Account name
- Account number
- Plan
- Amount of payment
- Reason for payment

The request must then be approved by the Area Manager - Finance.

Overpayments

When an account has been overpaid, the adjustment should be made on the next quarterly Pay Register. If such an adjustment is not possible, a check should be collected from the account, made payable to R.J. Reynolds Tobacco Company, and sent to Sales Finance.

51846 7354

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Pay Register Historical Reporting

Reprints of the Preliminary and Final Pay Register may be obtained from the SIS Historical Reporting System.

1. At the Application Selection Menu, type "X" in front of PRINT REPORT and press [ENTER].
2. At the Print Report Menu, type an "X" in front of the HISTORICAL REPORT SELECTION MENU and press [ENTER].
3. Select the report desired and follow screen prompts. From the Print Report Menu, you may also print Pay Registers by account number (for specific account information and voucher numbers), by alphabetical or by chain calls by territory.

```
GHCMGOHN                     PRINT REPORT MENU              05/24/93  16:16:48

_ DAILY SALES REP DETAIL CALL REPORT     _ MASTER ACCOUNT LIST
_ BRAND INVENTORY REPORT (*)             _ CHAIN MASTER ACCOUNT LIST
_ BRAND DISTRIBUTION REPORT (*)          _ WHOLESALE PRODUCT LINE LISTS
_ PROPOSED ALIGNMENT REPORT              _ BRAND DIST BY CALL CLASS (*)
_ ACCOUNT COVERAGE EXCEPTION REPORT      _ MONTHLY RETAIL COVERAGE REPORT
_ ACTIVITY SUMMARIES REPORT              _ CONTRACT SUMMARY REPORT
_ ACCOUNTS NOT CONTACTED REPORT          _ MERCH/ACCT MKT SUMMARY REPORT (*)
_ HISTORICAL REPORT SELECTION MENU       _ CHAIN NON COMPLIANCE REPORT
_ REFERENCE SCREENS MANUAL               _ SALES ADDRESS LABELS
_ CONTRACT PAYMENT-INQUIRY RPT           _ CHAIN STANDARD INFORMATION
_ CONTRACT PAYMENT-BY ACCOUNT NO.        _ HH-BRAND TO BRAND NAME REPORT
_ CONTRACT PAYMENT-ALPHABETICAL NAME     _ COUPON MANAGEMENT ACTIVITY DETAILS
_ CONTRACT PAYMENT-CHAIN BY TERRITORY    _ COUPON MANAGEMENT INVENTORY REPORTS
_ SCANNING DISPLAY REPORT                _ CPN PLACEMENT/INVENTORY RECON RPT
_ CPN-MGT INTER-DIVISION TRANSFERS       _
        * THESE REPORTS WILL BE SCHEDULED FOR OVERNIGHT EXECUTION

_ CHECK THE STATUS OF A PREVIOUSLY SCHEDULED PRINT REPORT
_ CHECK THE STATUS OF A PREVIOUSLY SUBMITTED PRINT REPORT

PRESS PF1 TO RETURN TO THE SIS MAIN MENU
```

VENDING PAY REGISTERS

The following pages describe how Vending Audit Procedures are to be performed.

51846 7355

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Section

1 Background

The Auditing Process at RJR...

In the past, RJR checked/audited vending lists using part-time employees/ temporaries and sales representatives. The process also required the involvement of managers and secretaries and was very costly and time consuming. Effective the third quarter of 1993, the auditing of vendor lists will be accomplished by mailing questionnaire/survey forms to vending locations claimed by the vendor. The results of the questionnaire/survey will be calculated by an outside company.

Under this new procedure RJR will require a 10% audit vs. the 5% physical audit previously required. This new procedure will establish nationwide uniformity in the payments made to vendor operators. As previously mentioned, the process will begin the third quarter of 1993. Your vendors will have already received notification from the Company announcing these changes. Also, prior to implementation, you will have discussed the test results with each vendor. The vendors will be responsible for updating the following information through their computer service:

- RJR brand placements
- Name of the location
- Street address
- City, state and zip code

The audit calculations will become part of the Pay Register System beginning the third quarter of 1993. The following pages are designed to explain how audits are calculated. If you have any questions, contact your management.

What This Document Contains...

Section 1: Background 21
Section 2: Vending Contracts 23-35
Section 3: Explanation of Questionnaire/Survey 36-38
Section 4: Explanation of Audit Reports 39-46

51846 7356

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

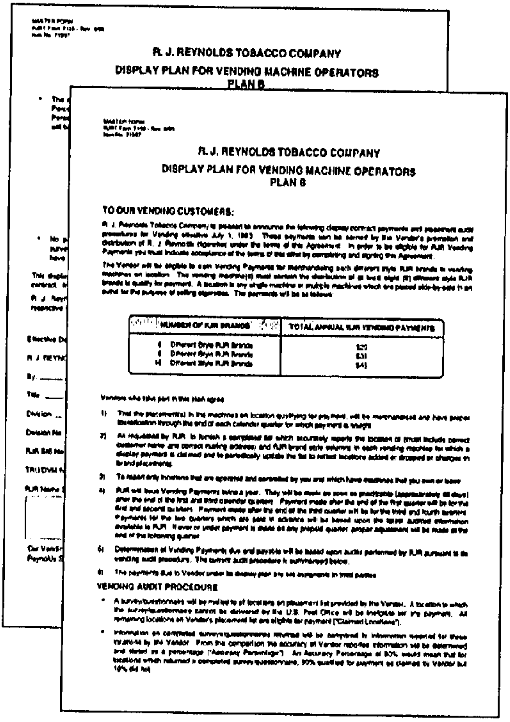
51846 7357

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Section

2 Vending Contracts


R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS

PLAN B

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS

PLAN B

TO OUR VENDING CUSTOMERS:

VENDING AUDIT PROCEDURE

51846 7358

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Vending Contracts

Plan B

Arizona, Alaska, Colorado, Florida, Idaho, Illinois (except Chicago Region), Indiana (except Chicago Region), Iowa, Kansas, Kentucky, Louisiana, Maryland (except Washington D.C. Region), Minnesota, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oklahoma, South Dakota, Texas, Utah, Virginia (except Washington, D.C. Region), West Virginia, Wyoming.

Plan B-1

Alabama, Arkansas, Georgia, Mississippi, North Carolina (except Forsyth County), Oregon, South Carolina, Tennessee, Washington.

Plan B-2

California, Chicago Region (including parts of Indiana), Connecticut, Delaware, Maine, Massachusetts, Michigan, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Washington, D.C. Region (including parts of Maryland and Virginia), Wisconsin.

Plan B-3

Hawaii

Plan B-4

Forsyth County, North Carolina

Note: Contracts must be signed and forwarded to Tru-Check Computer Systems, Inc. before third quarter payment can be processed.

51846 7359

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7135 - Rev. 4/93
Item No. 71357

51846 7360

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS PLAN B

TO OUR VENDING CUSTOMERS:

R. J. Reynolds Tobacco Company is pleased to announce the following display contract payments and placement audit procedures for Vending effective July 1, 1993. These payments can be earned by the Vendor's promotion and distribution of R. J. Reynolds cigarettes under the terms of this Agreement. In order to be eligible for RJR Vending Payments you must indicate acceptance of the terms of this offer by completing and signing this Agreement.

The Vendor will be eligible to earn Vending Payments for merchandising each different style RJR brands in vending machines on location. The vending machine(s) must contain the distribution of at least eight (8) different style RJR brands to qualify for payment. A location is any single machine or multiple machines which are placed side-by-side in an outlet for the purpose of selling cigarettes. The payments will be as follows:

NUMBER OF RJR BRANDS	TOTAL ANNUAL RJR VENDING PAYMENTS
8 Different Style RJR Brands	$20
9 Different Style RJR Brands	$35
10 Different Style RJR Brands	$45

Vendors who take part in this plan agree:

1) That the placement(s) in the machines on location qualifying for payment, will be merchandised and have proper identification through the end of each calendar quarter for which payment is sought.

2) As requested by RJR, to furnish a completed list which accurately reports the location of (must include correct customer name and correct mailing address) and RJR brand style columns in each vending machine for which a display payment is claimed and to periodically update the list to reflect locations added or dropped or changes in brand placements.

3) To report only locations that are operated and controlled by you and which have machines that you own or lease.

4) RJR will issue Vending Payments twice a year. They will be made as soon as practicable (approximately 45 days) after the end of the first and third calendar quarters. Payment made after the end of the first quarter will be for the first and second quarters. Payment made after the end of the third quarter will be for the third and fourth quarters. Payments for the two quarters which are paid in advance will be based upon the latest auditied information available to RJR. If over or under payment is made on any prepaid quarter, proper adjustment will be made at the end of the following quarter.

5) Determination of Vending Payments due and payable will be based upon audits performed by RJR pursuant to its vending audit procedure. The current audit procedure is summarized below.

6) The payments due to Vendor under its display plan are not assignable to third parties.

VENDING AUDIT PROCEDURE

- A survey/questionnaire will be mailed to all locations on placement list provided by the Vendor. A location to which the survey/questionnaire cannot be delivered by the U.S. Post Office will be ineligible for any payment. All remaining locations on Vendor's placement list are eligible for payment ("Claimed Locations").
- Information on completed surveys/questionnaires returned will be compared to information reported for these locations by the Vendor. From this comparison the accuracy of Vendor-reported information will be determined and stated as a percentage ("Accuracy Percentage"). An Accuracy Percentage of 90% would mean that for locations which returned a completed survey/questionnaire, 90% qualified for payment as claimed by Vendor but 10% did not.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7135 - Rev. 4/93
Item No. 71357

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B

- The amount earned by Vendor will be determined from a graduated scale and will vary according to its Accuracy Percentage and the total of payment requested for all Claimed Locations. For instance, if a Vendor's Accuracy Percentage is 90% or above, Vendor will receive 100% of payment requested for all Claimed Locations. The scale will be as follows:

ACCURACY PERCENTAGE	PAYMENT PERCENTAGE
90 - 100%	100%
80 - 89	90
70 - 79	80
60 - 69	70
50 - 59	60
49 and Below	Same as Accuracy Percentage

- No payment can be made to Vendor without an acceptable audit. An audit is unacceptable if completed surveys/questionnaires returned account for less than 10% of Vendor's locations. In such instances, Vendor will have the option of requesting a re-audit of all locations at Vendor's expense.

This display plan will remain in effect until terminated by notice by either party or until superseded by a new display contract. In the event of failure of performance by Vendor, no monies will be paid under this display plan.

R. J. Reynolds Tobacco Company and Vendor indicate their acceptance of the terms of this Agreement by their respective signatures herein below:

Effective Date: ____________________

R. J. REYNOLDS TOBACCO COMPANY

By: ____________________

Title: ____________________

Division: ____________________

Division No.: ____________________

RJR SIS No.: ____________________

TRU/DVM No.: ____________________

RJR Name Stamp

(PLEASE PRINT)

Vendor: ____________________

Street Address: ____________________

City: ____________________

State: __________ Zip: __________

By: ____________________

Title: ____________________

51846 7361

Our Vending Plans are made available on proportionately equal terms to all competing Vendors. Contact your local Reynolds Sales Representative for information on these plans.

COPIES: (1) Division Office (2) Vendor Copy (3) Tru-Check Computer Systems, Inc.
85 Executive Blvd.
Elmsford, New York 10523

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7136- Rev. 4/93
Item No. 71365

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-1

TO OUR VENDING CUSTOMERS:

R. J. Reynolds Tobacco Company is pleased to announce the following display contract payments and placement audit procedures for Vending effective July 1, 1993. These payments can be earned by the Vendor's promotion and distribution of R. J. Reynolds cigarettes under the terms of this Agreement. In order to be eligible for RJR Vending Payments you must indicate acceptance of the terms of this offer by completing and signing this Agreement.

The Vendor will be eligible to earn Vending Payments for merchandising each different style RJR brands in vending machines on location. The vending machine(s) must contain the distribution of at least eight (8) different style RJR brands to qualify for payment. A location is any single machine or multiple machines which are placed side-by-side in an outlet for the purpose of selling cigarettes. The payments will be as follows:

NUMBER OF RJR BRANDS	TOTAL ANNUAL RJR VENDING PAYMENTS
8 Different Style RJR Brands	$20
9 Different Style RJR Brands	$35
10 Different Style RJR Brands	$45
11 Different Style RJR Brands	$50
12 Different Style RJR Brands	$55

51846 7362

Vendors who take part in this plan agree:

1) That the placement(s) in the machines on location qualifying for payment, will be merchandised and have proper identification through the end of each calendar quarter for which payment is sought.

2) As requested by RJR, to furnish a completed list which accurately reports the location of (must include correct customer name and correct mailing address) and RJR brand style columns in each vending machine for which a display payment is claimed and to periodically update the list to reflect locations added or dropped or changes in brand placements.

3) To report only locations that are operated and controlled by you and which have machines that you own or lease.

4) RJR will issue Vending Payments twice a year. They will be made as soon as practicable (approximately 45 days) after the end of the first and third calendar quarters. Payment made after the end of the first quarter will be for the first and second quarters. Payment made after the end of the third quarter will be for the third and fourth quarters. Payments for the two quarters which are paid in advance will be based upon the latest audited information available to RJR. If over or under payment is made on any prepaid quarter, proper adjustment will be made at the end of the following quarter.

5) Determination of Vending Payments due and payable will be based upon audits performed by RJR pursuant to its vending audit procedure. The current audit procedure is summarized below.

6) The payments due to Vendor under its display plan are not assignable to third parties.

VENDING AUDIT PROCEDURE

- A survey/questionnaire will be mailed to all locations on placement list provided by the Vendor. A location to which the survey/questionnaire cannot be delivered by the U.S. Post Office will be ineligible for any payment. All remaining locations on Vendor's placement list are eligible for payment ("Claimed Locations").
- Information on completed surveys/questionnaires returned will be compared to information reported for these locations by the Vendor. From this comparison the accuracy of Vendor-reported information will be determined and stated as a percentage ("Accuracy Percentage"). An Accuracy Percentage of 90% would mean that for locations which returned a completed survey/questionnaire, 90% qualified for payment as claimed by Vendor but 10% did not.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7136 - Rev. 4/93
Item No. 71365

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-1

- The amount earned by Vendor will be determined from a graduated scale and will vary according to its Accuracy Percentage and the total of payment requested for all Claimed Locations. For instance, if a Vendor's Accuracy Percentage is 90% or above, Vendor will receive 100% of payment requested for all Claimed Locations. The scale will be as follows:

ACCURACY PERCENTAGE	PAYMENT PERCENTAGE
90 - 100%	100%
80 - 89	90
70 - 79	80
60 - 69	70
50 - 59	60
49 and Below	Same as Accuracy Percentage

- No payment can be made to Vendor without an acceptable audit. An audit is unacceptable if completed surveys/questionnaires returned account for less than 10% of Vendor's locations. In such instances, Vendor will have the option of requesting a re-audit of all locations at Vendor's expense.

This display plan will remain in effect until terminated by notice by either party or until superseded by a new display contract. In the event of failure of performance by Vendor, no monies will be paid under this display plan.

R. J. Reynolds Tobacco Company and Vendor indicate their acceptance of the terms of this Agreement by their respective signatures herein below:

Effective Date: ____________________

R. J. REYNOLDS TOBACCO COMPANY	(PLEASE PRINT)
By: ____________________	Vendor: ____________________
Title: ____________________	Street Address: ____________________
Division: ____________________	____________________
Division No.: ____________________	City: ____________________
RJR SIS No.: ____________________	State: __________ Zip: __________
TRU/DVM No.: ____________________	By: ____________________
RJR Name Stamp	Title: ____________________

51846 7363

Our Vending Plans are made available on proportionately equal terms to all competing Vendors. Contact your local Reynolds Sales Representative for information on these plans.

COPIES: (1) Division Office (2) Vendor Copy (3) Tru-Check Computer Systems, Inc.
85 Executive Blvd.
Elmsford, New York 10523

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7137- Rev. 4/93
Item No. 71373

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-2

TO OUR VENDING CUSTOMERS:

R. J. Reynolds Tobacco Company is pleased to announce the following display contract payments and placement audit procedures for Vending effective July 1, 1993. These payments can be earned by the Vendor's promotion and distribution of R. J. Reynolds cigarettes under the terms of this Agreement. In order to be eligible for RJR Vending Payments you must indicate acceptance of the terms of this offer by completing and signing this Agreement.

The Vendor will be eligible to earn Vending Payments for merchandising each different style RJR brands in vending machines on location. The vending machine(s) must contain the distribution of at least six (6) different style RJR brands to qualify for payment. A location is any single machine or multiple machines which are placed side-by-side in an outlet for the purpose of selling cigarettes. The payments will be as follows:

NUMBER OF RJR BRANDS	TOTAL ANNUAL RJR VENDING PAYMENTS
6 Different Style RJR Brands	$20
7 Different Style RJR Brands	$25
8 Different Style RJR Brands	$30

51846 7364

Vendors who take part in this plan agree:

1) That the placement(s) in the machines on location qualifying for payment, will be merchandised and have proper identification through the end of each calendar quarter for which payment is sought.

2) As requested by RJR, to furnish a completed list which accurately reports the location of (must include correct customer name and correct mailing address) and RJR brand style columns in each vending machine for which a display payment is claimed and to periodically update the list to reflect locations added or dropped or changes in brand placements.

3) To report only locations that are operated and controlled by you and which have machines that you own or lease.

4) RJR will issue Vending Payments twice a year. They will be made as soon as practicable (approximately 45 days) after the end of the first and third calendar quarters. Payment made after the end of the first quarter will be for the first and second quarters. Payment made after the end of the third quarter will be for the third and fourth quarters. Payments for the two quarters which are paid in advance will be based upon the latest audited information available to RJR. If over or under payment is made on any prepaid quarter, proper adjustment will be made at the end of the following quarter.

5) Determination of Vending Payments due and payable will be based upon audits performed by RJR pursuant to its vending audit procedure. The current audit procedure is summarized below.

6) The payments due to Vendor under its display plan are not assignable to third parties.

VENDING AUDIT PROCEDURE

- A survey/questionnaire will be mailed to all locations on placement list provided by the Vendor. A location to which the survey/questionnaire cannot be delivered by the U.S. Post Office will be ineligible for any payment. All remaining locations on Vendor's placement list are eligible for payment ("Claimed Locations").

- Information on completed surveys/questionnaires returned will be compared to information reported for these locations by the Vendor. From this comparison the accuracy of Vendor-reported information will be determined and stated as a percentage ("Accuracy Percentage"). An Accuracy Percentage of 90% would mean that for locations which returned a completed survey/questionnaire, 90% qualified for payment as claimed by Vendor but 10% did not.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7137 - Rev. 4/93
Item No. 71373

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-2

- The amount earned by Vendor will be determined from a graduated scale and will vary according to its Accuracy Percentage and the total of payment requested for all Claimed Locations. For instance, if a Vendor's Accuracy Percentage is 90% or above, Vendor will receive 100% of payment requested for all Claimed Locations. The scale will be as follows:

ACCURACY PERCENTAGE	PAYMENT PERCENTAGE
90 - 100%	100%
80 - 89	90
70 - 79	80
60 - 69	70
50 - 59	60
49 and Below	Same as Accuracy Percentage

- No payment can be made to Vendor without an acceptable audit. An audit is unacceptable if completed surveys/questionnaires returned account for less than 10% of Vendor's locations. In such instances, Vendor will have the option of requesting a re-audit of all locations at Vendor's expense.

This display plan will remain in effect until terminated by notice by either party or until superseded by a new display contract. In the event of failure of performance by Vendor, no monies will be paid under this display plan.

R. J. Reynolds Tobacco Company and Vendor indicate their acceptance of the terms of this Agreement by their respective signatures herein below:

Effective Date: ______________________

R. J. REYNOLDS TOBACCO COMPANY	(PLEASE PRINT)
By: ______________________	Vendor: ______________________
Title: ______________________	Street Address: ______________________
Division: ______________________	______________________
Division No.: ______________________	City: ______________________
RJR SIS No.: ______________________	State: ____________ Zip: ________
TRU/DVM No.: ______________________	By: ______________________
RJR Name Stamp	Title: ______________________

51846 7365

Our Vending Plans are made available on proportionately equal terms to all competing Vendors. Contact your local Reynolds Sales Representative for information on these plans.

COPIES: (1) Division Office (2) Vendor Copy (3) Tru-Check Computer Systems, Inc.
85 Executive Blvd.
Elmsford, New York 10523

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7138- Rev. 4/93
Item No. 71381

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-3

TO OUR VENDING CUSTOMERS:

R. J. Reynolds Tobacco Company is pleased to announce the following display contract payments and placement audit procedures for Vending effective July 1, 1993. These payments can be earned by the Vendor's promotion and distribution of R. J. Reynolds cigarettes under the terms of this Agreement. In order to be eligible for RJR Vending Payments you must indicate acceptance of the terms of this offer by completing and signing this Agreement.

The Vendor will be eligible to earn Vending Payments for merchandising each different style RJR brands in vending machines on location. The vending machine(s) must contain the distribution of at least six (6) different style RJR brands to qualify for payment. A location is any single machine or multiple machines which are placed side-by-side in an outlet for the purpose of selling cigarettes. The payments will be as follows:

NUMBER OF RJR BRANDS	TOTAL ANNUAL RJR VENDING PAYMENTS
6 Different Style RJR Brands	$11
7 Different Style RJR Brands	$20
8 Different Style RJR Brands	$30
9 Different Style RJR Brands	$40

51846 7366

Vendors who take part in this plan agree:

1) That the placement(s) in the machines on location qualifying for payment, will be merchandised and have proper identification through the end of each calendar quarter for which payment is sought.

2) As requested by RJR, to furnish a completed list which accurately reports the location of (must include correct customer name and correct mailing address) and RJR brand style columns in each vending machine for which a display payment is claimed and to periodically update the list to reflect locations added or dropped or changes in brand placements.

3) To report only locations that are operated and controlled by you and which have machines that you own or lease.

4) RJR will issue Vending Payments twice a year. They will be made as soon as practicable (approximately 45 days) after the end of the first and third calendar quarters. Payment made after the end of the first quarter will be for the first and second quarters. Payment made after the end of the third quarter will be for the third and fourth quarters. Payments for the two quarters which are paid in advance will be based upon the latest audited information available to RJR. If over or under payment is made on any prepaid quarter, proper adjustment will be made at the end of the following quarter.

5) Determination of Vending Payments due and payable will be based upon audits performed by RJR pursuant to its vending audit procedure. The current audit procedure is summarized below.

6) The payments due to Vendor under its display plan are not assignable to third parties.

VENDING AUDIT PROCEDURE

- A survey/questionnaire will be mailed to all locations on placement list provided by the Vendor. A location to which the survey/questionnaire cannot be delivered by the U.S. Post Office will be ineligible for any payment. All remaining locations on Vendor's placement list are eligible for payment ("Claimed Locations").
- Information on completed surveys/questionnaires returned will be compared to information reported for these locations by the Vendor. From this comparison the accuracy of Vendor-reported information will be determined and stated as a percentage ("Accuracy Percentage"). An Accuracy Percentage of 90% would mean that for locations which returned a completed survey/questionnaire, 90% qualified for payment as claimed by Vendor but 10% did not.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 7138 - Rev. 4/93
Item No. 71381

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-3

- The amount earned by Vendor will be determined from a graduated scale and will vary according to its Accuracy Percentage and the total of payment requested for all Claimed Locations. For instance, if a Vendor's Accuracy Percentage is 90% or above, Vendor will receive 100% of payment requested for all Claimed Locations. The scale will be as follows:

ACCURACY PERCENTAGE	PAYMENT PERCENTAGE
90 - 100%	100%
80 - 89	90
70 - 79	80
60 - 69	70
50 - 59	60
49 and Below	Same as Accuracy Percentage

- No payment can be made to Vendor without an acceptable audit. An audit is unacceptable if completed surveys/questionnaires returned account for less than 10% of Vendor's locations. In such instances, Vendor will have the option of requesting a re-audit of all locations at Vendor's expense.

This display plan will remain in effect until terminated by notice by either party or until superseded by a new display contract. In the event of failure of performance by Vendor, no monies will be paid under this display plan.

R. J. Reynolds Tobacco Company and Vendor indicate their acceptance of the terms of this Agreement by their respective signatures herein below:

Effective Date: ______________________

R. J. REYNOLDS TOBACCO COMPANY

By: ______________________

Title: ______________________

Division: ______________________

Division No.: ______________________

RJR SIS No.: ______________________

TRU/DVM No.: ______________________

RJR Name Stamp

(PLEASE PRINT)

Vendor: ______________________

Street Address: ______________________

____

City: ______________________

State: ____________ Zip: ____________

By: ______________________

Title: ______________________

51846 7367

Our Vending Plans are made available on proportionately equal terms to all competing Vendors. Contact your local Reynolds Sales Representative for information on these plans.

COPIES: (1) Division Office (2) Vendor Copy (3) Tru-Check Computer Systems, Inc.
85 Executive Blvd.
Elmsford, New York 10523

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 157764 - 4/93
Item No. 157764

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-4

TO OUR VENDING CUSTOMERS:

R. J. Reynolds Tobacco Company is pleased to announce the following display contract payments and placement audit procedures for Vending effective July 1, 1993. These payments can be earned by the Vendor's promotion and distribution of R. J. Reynolds cigarettes under the terms of this Agreement. In order to be eligible for RJR Vending Payments you must indicate acceptance of the terms of this offer by completing and signing this Agreement.

The Vendor will be eligible to earn Vending Payments for merchandising each different style RJR brands in vending machines on location. The vending machine(s) must contain the distribution of at least eight (8) different style RJR brands to qualify for payment. A location is any single machine or multiple machines which are placed side-by-side in an outlet for the purpose of selling cigarettes. The payments will be as follows:

NUMBER OF RJR BRANDS	TOTAL ANNUAL RJR VENDING PAYMENTS
8 Different Style RJR Brands	$20
9 Different Style RJR Brands	$35
10 Different Style RJR Brands	$45
11 Different Style RJR Brands	$50
12 Different Style RJR Brands	$55

51846 7368

Additionally, the Vendor will be eligible to earn Vending Payments of $3 per year for each additional style merchandised over 12 brands.

Vendors who take part in this plan agree:

1) That the placement(s) in the machines on location qualifying for payment, will be merchandised and have proper identification through the end of each calendar quarter for which payment is sought.

2) As requested by RJR, to furnish a completed list which accurately reports the location of (must include correct customer name and correct mailing address) and RJR brand style columns in each vending machine for which a display payment is claimed and to periodically update the list to reflect locations added or dropped or changes in brand placements.

3) To report only locations that are operated and controlled by you and which have machines that you own or lease.

4) RJR will issue Vending Payments twice a year. They will be made as soon as practicable (approximately 45 days) after the end of the first and third calendar quarters. Payment made after the end of the first quarter will be for the first and second quarters. Payment made after the end of the third quarter will be for the third and fourth quarters. Payments for the two quarters which are paid in advance will be based upon the latest audited information available to RJR. If over or under payment is made on any prepaid quarter, proper adjustment will be made at the end of the following quarter.

5) Determination of Vending Payments due and payable will be based upon audits performed by RJR pursuant to its vending audit procedure. The current audit procedure is summarized below.

6) The payments due to Vendor under its display plan are not assignable to third parties.

VENDING AUDIT PROCEDURE

- A survey/questionnaire will be mailed to all locations on placement list provided by the Vendor. A location to which the survey/questionnaire cannot be delivered by the U.S. Post Office will be ineligible for any payment. All remaining locations on Vendor's placement list are eligible for payment ("Claimed Locations").
- Information on completed surveys/questionnaires returned will be compared to information reported for these locations by the Vendor. From this comparison the accuracy of Vendor-reported information will be determined and stated as a percentage ("Accuracy Percentage"). An Accuracy Percentage of 90% would mean that for locations which returned a completed survey/questionnaire, 90% qualified for payment as claimed by Vendor but 10% did not.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

MASTER FORM
RJRT Form 157764 - 4/93
Item No. 157764

R. J. REYNOLDS TOBACCO COMPANY

DISPLAY PLAN FOR VENDING MACHINE OPERATORS
PLAN B-4

- The amount earned by Vendor will be determined from a graduated scale and will vary according to its Accuracy Percentage and the total of payment requested for all Claimed Locations. For instance, if a Vendor's Accuracy Percentage is 90% or above, Vendor will receive 100% of payment requested for all Claimed Locations. The scale will be as follows:

ACCURACY PERCENTAGE	PAYMENT PERCENTAGE
90 - 100%	100%
80 - 89	90
70 - 79	80
60 - 69	70
50 - 59	60
49 and Below	Same as Accuracy Percentage

- No payment can be made to Vendor without an acceptable audit. An audit is unacceptable if completed surveys/questionnaires returned account for less than 10% of Vendor's locations. In such instances, Vendor will have the option of requesting a re-audit of all locations at Vendor's expense.

This display plan will remain in effect until terminated by notice by either party or until superseded by a new display contract. In the event of failure of performance by Vendor, no monies will be paid under this display plan.

R. J. Reynolds Tobacco Company and Vendor indicate their acceptance of the terms of this Agreement by their respective signatures herein below:

Effective Date: ______________________

R. J. REYNOLDS TOBACCO COMPANY	(PLEASE PRINT)
By: ______________________	Vendor: ______________________
Title: ______________________	Street Address: ______________________
Division: ______________________	______________________
Division No.: ______________________	City: ______________________
RJR SIS No.: ______________________	State: __________ Zip: __________
TRU/DVM No.: ______________________	By: ______________________
RJR Name Stamp	Title: ______________________

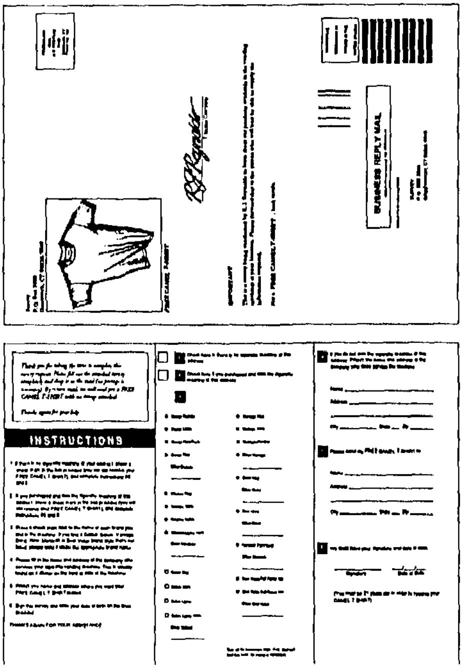
51846 7369

Our Vending Plans are made available on proportionately equal terms to all competing Vendors. Contact your local Reynolds Sales Representative for information on these plans.

COPIES: (1) Division Office (2) Vendor Copy (3) Tru-Check Computer Systems, Inc.
85 Executive Blvd.
Elmsford, New York 10523

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Section 3 The Questionnaire/ Survey


BUSINESS REPLY MAIL

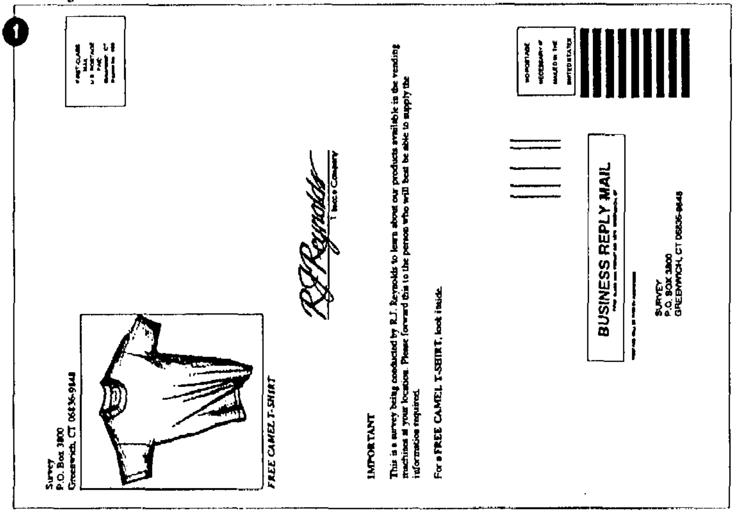
INSTRUCTIONS

51846 7370

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Cover Page



Questionnaire:

Thank you for taking the time to complete this survey request. Please fill out the attached survey completely and drop it in the mail (no postage is necessary). By return mail, we will send you a FREE CAMEL T-SHIRT with no strings attached.

Thanks again for your help.

INSTRUCTIONS

1. If there is no cigarette machine at your address, place a check mark in the box provided (you will still receive your FREE CAMEL T-SHIRT), and complete instructions #5 and 6.
2. If you purchased and own the cigarette machine at this address, place a check mark in the box provided (you will still receive your FREE CAMEL T-SHIRT), and complete instructions #5 and 6.
3. Place a check mark next to the name of each brand you find in the machine. If you find a Camel, Salem, Vantage, Doral, Now, Monarch or Best Value brand style that's not listed, please write it under the appropriate brand name.
4. Please fill in the name and address of the company who services your cigarette vending machine. This is usually found on a sticker on the front or side of the machine.
5. PRINT you name and address where you want your *FREE CAMEL T-SHIRT* mailed.
6. Sign this survey and write your date of birth on the lines provided.

THANKS AGAIN FOR YOUR ASSISTANCE.

1 ☐ Check here if there is no cigarette machine at this address.

2 ☐ Check here if you purchased and own the cigarette machine at this address.

3

☐ Camel Regular
☐ Camel Lights
☐ Camel Hard Pack
☐ Camel Filter
Other Camels ________

☐ Winston King
☐ Winston 100's
☐ Winston Lights
☐ Winston Lights 100's
Other Winstons ________

☐ Salem King
☐ Salem 100's
☐ Salem Lights
☐ Salem Lights 100's
Other Salems ________

☐ Vantage King
☐ Vantage 100's
☐ Vantage Menthol
☐ Other Vantage ________

☐ Doral King
Other Doral ________

☐ Now 100's
Other Nows ________

☐ Monarch Full Flavor
Other Monarch ________

☐ Best Value Full Flavor '85
☐ Best Value Full Flavor 100
Other Best Value ________

Tear off the instruction page. Fold, seal and mail this audit. No stamp is necessary.

4 If you do not own the cigarette machine at this address, PRINT the name and address of the company who does service the machine.

Name ________
Address ________
____
City ________ State ___ Zip ________

5 Please send my FREE CAMEL T-SHIRT to:

Name ________
Address ________
____
City ________ State ___ Zip ________

6 We must have your signature and date of birth.

________ Signature
___/___/___ Date of Birth

(You must be 21 years old or older to receive your CAMEL T-SHIRT)

51846 7371

Copyright © R.J. Reynolds Tobacco Company 1993

Purpose of Questionnaire/Survey

This questionnaire/survey is mailed to every location claimed on a vendor's list. The individual who completes and returns the questionnaire/survey will receive a gift for participating. The results of these responses are calculated to form the Cigarette Machine Audit Detail Report and Summary which is described in section 4 of this document.

Description of Questionnaire/Survey

1. This is the front side of the questionnaire/survey which indicates that the information should be completed. Note that this questionnaire/survey should be completed, folded and returned for processing in order to receive the gift. No postage is necessary.
2. This section provides instructions for completing the questionnaire/survey.
3. This is the questionnaire/survey.

NOTE: Item 6 requires a signature and date of birth before the gift can be sent.

51846 7372

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

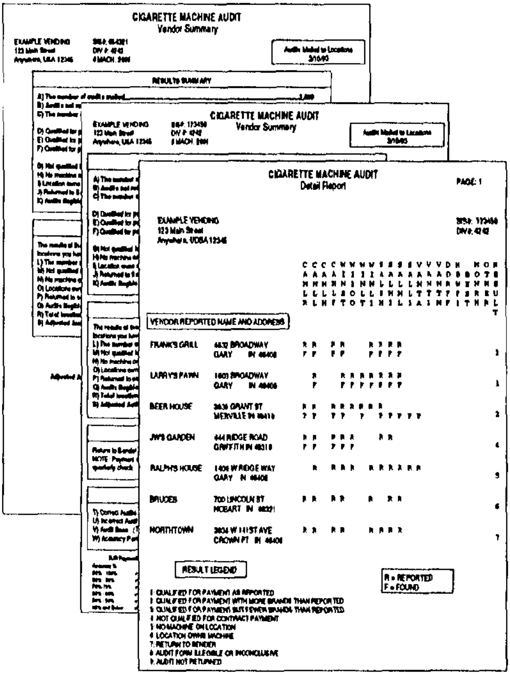
51846 7373

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Section

4 The Audit Reports



51846 7374

Copyright © R.J. Reynolds Tobacco Company 1993

Cigarette Machine Audit Detail Report

CIGARETTE MACHINE AUDIT
Detail Report

PAGE: 1

❶

EXAMPLE VENDING
123 Main Street
Anywhere, UDSA 12345

❷ SIS#: 123456
DIV#: 4242

❸ ❹ ❺

VENDOR REPORTED NAME AND ADDRESS		CAMLR	CAMLL	CAMLH	CAMLF	WINST	WI1OO	WINLT	WINL1	SALEM	SALM1	SALML	SALL1	VANTA	VANT1	VANTM	DDRFF	NBWF1	BBEST	MONRH	OTHER	RESULT
FRANK'S GRILL	4832 BROADWAY GARY IN 46408	R F	R F		R F	R F			R F	R F	R F	R F										1
LARRY'S PAWN	1603 BROADWAY GARY IN 46408		R F			R F	R F	R F	R F	R F	R F	R F										1
BEER HOUSE	3839 GRANT ST MERVILLE IN 46410	R F	R F		R F	R F	R	R F	R	R F	F	F	F	F								2
JW'S GARDEN	444 RIDGE ROAD GRIFFITH IN 46319	R F	R F		R F	R F	R F			R	R											4
RALPH'S HOUSE	1400 W RIDGE WAY GARY IN 46408		R		R	R	R		R	R	R	R	R	R								5
BRUCES	700 LINCOLN ST HOBART IN 46321	R	R		R	R			R		R	R										6
NORTHTOWN	3838 W 141ST AVE CROWN PT IN 46409	R	R		R	R			R	R	R	R										7

❻ RESULT LEGEND

1: QUALIFIED FOR PAYMENT AS REPORTED
2: QUALIFIED FOR PAYMENT WITH MORE BRANDS THAN REPORTED
3: QUALIFIED FOR PAYMENT BUT FEWER BRANDS THAN REPORTED
4: NOT QUALIFIED FOR CONTRACT PAYMENT
5: NO MACHINE ON LOCATION
6: LOCATION OWNS MACHINE
7: RETURN TO SENDER
8: AUDIT FORM ILLEGIBLE OR INCONCLUSIVE
9: AUDIT NOT RETURNED

❼ R = REPORTED
F = FOUND

51846 7375

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Explanation of Cigarette Machine Audit Detail

Purpose of Report

This report is issued through SIS once the results of the questionnaire/survey have been calculated. There will be an audit detail report for each vendor, listing the locations the vendor claims, the name and address of the location and the results of the audit. The audit indicates on the top line for each location what brands the vendor reported for the machine at this location (marked with an R) and the second line for each location indicates what brands the location actually found in the machine (marked with an F) based on the questionnaire/survey responses. From this audit detail report, then a summary is calculated for each vendor. The summary report is described on pages 24 and 25.

Report Details

1. Vendor name and address.
2. SIS and Division number of the vendor.
3. These are the addresses and locations claimed by the vendor. The "Rs" in the first line indicate what brands the vendor reported for the machine at this location. The "Fs" in the second line indicate what brands the location actually reported as being in the machine.
4. RJR brand placement alignment.
5. This is the results column. Refer to the Results Legend for interpretation
6. Result Legend in numeric order.

   1 - Qualified for payment as reported
   2 - Qualified for payment with more brands than reported
   3 - Qualified for payment but fewer brands than reported
   4 - Not qualified for contract payment
   5 - No machine on location
   6 - Location owns machine
   7 - Return to sender
   8 - Audit form illegible or inconclusive
   9 - Audit not returned

7. This legend indicates how the brand was claimed and/or verified.

   - R - Brand reported by vendor
   - F - Brand found by questionnaire/survey

51846 7376

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Cigarette Machine Audit Vendor Summary (Valid Audit)

1

EXAMPLE VENDING
123 Main Street
Anywhere, USA 12345

2

SIS#: 123456
DIV #: 4242
MACH: 2899

CIGARETTE MACHINE AUDIT
Vendor Summary

3

Audits Mailed to Locations
3/10/93

4

RESULTS SUMMARY

A) The number of audits mailed.......2,899
B) Audits not returned.......2,076
C) The number of Audit forms returned..(D through K).......823

D) Qualified for payment as reported.......28
E) Qualified for payment with more brands than reported.......51
F) Qualified for payment but fewer brands than reported.......80

G) Not qualified for contract payment.......55
H) No machine on location.......56
I) Location owns machine.......1
J) Returned to Sender.......552
K) Audits illegible or inconclusive.......0

5

ADJUSTED AUDITS FOR LOCATIONS DROPPED

The results of the audit, mailed 3/10/93, were then compared to your location list as of 4/25/93 to adjust for locations you have dropped.

L) The number of audit forms returned.......(line C).......823
M) Not qualified for contract payment.......0
N) No machine on location.......10
O) Location owns the machine.......0
P) Returned to sender.......63
Q) Audits illegible or inconclusive.......0
R) Total locations dropped....(M thru Q).......73
S) Adjusted Audits for locations dropped....(L minus R).......750

6

RETURN TO SENDER

Return to Sender...(J minus P).......489
NOTE: Payment claimed on these 489 locations was $7,500. This amount will be subtracted from your next quarterly check.

7

ACCURACY PERCENTAGE

T) Correct Audits...(D + E + F).......159
U) Incorrect Audits..(G + H + I) minus (M + N + O).......102
V) Audit Base...(T + U).......261
W) Accuracy Percentage.. (T ÷ V).......61%

8

RJR Use Only

9

RJR Payment Scale

Accuracy %		Payment %
90% - 100%	=	100%
80% - 89%	=	90%
70%-79%	=	80%
60% - 69%	=	70%
50% - 59%	=	60%
49% and Below	=	Line W

10

Date ________

RJR Rep ________

Vend Operator ________

51346 7377

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Explanation of Cigarette Machine Audit Vendor Summary

Purpose of Report

This report is issued through SIS once the audit process has been completed. It provides a summary of audit responses, calculates the results and provides an accuracy percentage rating from which the vendor payment amount is derived. Refer to the following report detail for descriptions.

Report Detail

1. Vendor name and address.

2. SIS and Division number for the vendor and the number of the machines claimed by the vendor.

3. This is the date the questionnaire/survey was mailed to the locations.

4. The information in the *Results Summary* section indicates the number of audits mailed (line A), the number of audits not returned (line B), and the number of audit forms returned (line C). Lines D through K indicate the number of machines which either qualify or do not qualify for payment based on the stated criteria.

5. The information in the *Adjusted Audits for Locations Dropped* section indicates the results of the audit mailed on the date specified (see 3) when compared with the vendor's location list as specified in the first sentence in section 5 (e.g., 4/25/93). Lines M through Q make adjustments for locations dropped based on the latest location list received from the vendor. Line R provides the total of locations dropped (lines M through Q) since the audit was mailed. Line S must represent 10% of line A in order to have a valid audit. If the audit was not valid, then you will receive a report similar to the one described on pages 26 and 27 of this document. NOTE: If lines M through Q are all zeros, then this *may* indicate that the vendor has not made an attempt to update the location list.

6. The *Return to Sender* section indicates the number of audits that were marked as undeliverable by the postal service and is calculated for you by an outside auditing company. The dollar amount indicates what is being adjusted on the Pay Register. This amount will automatically be *deducted* from the total amount claimed by the vendor.

7. The *Accuracy Percentage* section explains how the results of the audit were calculated. Line T is the sum of lines D + E + F. Line U contains the results of the sum of lines G + H + I minus the sum of the results from lines M + N + O. Line V is the sum of lines T + U which establishes the audit base. Line W establishes the accuracy percentage by dividing line T by line V. **IMPORTANT:** Accuracy percentage will be used as the basis for payment calculations from the "RJR Payment Scale."

8. The *RJR Use Only* section is where you may make adjustments to the information in the *Accuracy Percentage* section. In situations where the vendor can prove to your satisfaction that some of audits on lines G, H and I were actually correct, then you may use this space to recalculate the accuracy percentage. Additionally, a vendor may claim new placements that were not submitted through the reporting system. Enter the new numbers for lines T through W in this section.

9. These are the payment guidelines. After establishing the accuracy percentage, use this scale to determine the vendor's percentage of payment. The scale provides flexibility for vendors scoring 50% or better. Any vendor with an accuracy percentage rating of 49% or less will be paid on the exact percentage amount. This payment scale reflects the percentage of payment the vendor will receive after deducting the return to sender dollar amount.

10. In this section, enter the date and your signature. The vendor should sign indicating that they understand the audit process as explained. NOTE: **The vendor will be paid on the accuracy percentage calculated regardless of whether or not they sign this audit.**

51846 7378

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Cigarette Machine Audit Vendor Summary (Invalid Audit)

CIGARETTE MACHINE AUDIT
Vendor Summary

1
EXAMPLE VENDING
123 Main Street
Anywhere, USA 12345

2
SIS#: 654321
DIV #: 4242
MACH: 50

3
Audits Mailed to Locations
3/10/93

4
RESULTS SUMMARY

A) The number of audits mailed........50
B) Audits not returned........46
C) The number of Audit forms returned..(D through K)........4

D) Qualified for payment as reported........1
E) Qualified for payment with more brands than reported........1
F) Qualified for payment but fewer brands than reported........0

G) Not qualified for contract payment........0
H) No machine on location........0
I) Location owns machine........0
J) Returned to Sender........2
K) Audits illegible or inconclusive........0

5
ADJUSTED AUDITS FOR LOCATIONS DROPPED

The results of the audit, mailed 3/10/93, were then compared to your location list as of 4/25/93 to adjust for locations you have dropped.
L) The number of audit forms returned......(line C)........4
M) Not qualified for contract payment........0
N) No machine on location........0
O) Location owns the machine........0
P) Returned to sender........0
Q) Audits illegible or inconclusive........0
R) Total locations dropped....(M thru Q)........0
S) Adjusted Audits for locations dropped....(L minus R)........4

6
Adjusted Audits (Line S) does not equal a minimum of 10% of the Audits mailed (Line A).

THIS IS NOT A VALID AUDIT.

7
Date__________

RJR Rep __________

Vend Operator __________

51846 7379

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Explanation of Cigarette Machine Audit Vendor Summary

Purpose of Report

This report is issued through SIS once the audit process has been completed. It indicates that the results of the audit did not meet RJR criteria for a valid audit and, therefore, the vendor is not eligible to receive payment. This report should be used as a tool to encourage vendor operators to submit an accurate list for quarterly payment. Refer to the following field descriptions.

Report Detail

1. Vendor name and address.
2. SIS and Division number for the vendor and the number of the machines claimed by the vendor.
3. This is the date the audit was mailed to the locations.
4. The information in the *Results Summary* section indicates the number of audits mailed (line A), the number of audits not returned (line B), and the number of audit forms returned (line C). Lines D through K indicate the number of machines which either qualify or do not qualify for payment based on the stated criteria.
5. The information in the *Adjusted Audits for Locations Dropped* section indicates the results of the audit mailed on the date specified (see 3) when compared with the vendor's location list as specified in the first sentence in section 5 (e.g., 4/25/93). Lines M through Q make adjustments for locations dropped based on the latest location list received from the vendor. Line R provides the total of locations dropped (lines M through Q) since the audit was mailed. Line S must represent 10% of line A in order to have a valid audit.

   NOTE: If lines M through Q are all zeros, then this *may* indicate that the vendor has not made an attempt to update the location list.

IMPORTANT

6. This statement indicates that line S does not equal 10% of line A and, therefore, the vendor is not eligible to receive payment. If the vendor wants to be reaudited for the pay period in question, they must update their list and contact you. You should then contact Jack Regan at (919) 741-5360 or Frank Vestal (919) 741-7753 and request a reaudit. **The vendor will be reaudited at a charge of $2 per machine for the entire list.** You must explain this charge to the vendor. The $2 per machine charge will be deducted from the Pay Register after a valid audit is received. Your division offices have the responsibility of ensuring that this money is deducted.

   If the vendor does not wish to incur the $2 per machine charge, they have the option to wait for the next RJR audit period. If they choose this option, they will not receive payment for the period with an invalid audit. **No retroactive payment (for an invalid audit period) will be made once a valid audit is received.**

7. In this section, enter the date and your signature. The vendor should sign indicating that they understand the audit process as explained.

51846 7380

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7381

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Adjusting Vending Pay Register

Payments are made to vendors at the close of the first quarter for the first half of the year (second quarter prepaid). Similarly, the payment made at the end of the third quarter is for the second half of the year (fourth quarter prepaid). Therefore, it is important to note the following:

- Adjustments can be made to the current and/or prepaid quarter payment on the first and third quarter Pay Registers only.
- Adjustments made to the second and fourth quarter Pay Registers will be reflected on that quarter only. A previous quarter prepayment cannot be adjusted. If a net is due the vendor or RJRT, it will automatically be carried over to the next quarter for payment.

To make an adjustment to a Vending Pay Register:

1. At the *Vending Pay Register* screen, overkey the amount owed under ADJUSTED AMOUNT.
2. Enter a reason after CURRENT ADJ REASON.
3. Enter a reason after NEXT ADJ/ADJ REASON to explain the next quarter prepayment adjustment and press [ENTER].
4. Follow screen prompts to complete the process.

   ❖ *Note:* Verification method must be shown on all Pay Registers prior to approval.

Chain/Corporate Vendors and Branches

All branches for a Chain/Corporate vendor with payment made to Headquarters location must have preliminary approval made by the Manager with call responsibility before the Chain/Corporate Pay Register can be approved.

Once preliminary approval has been made at brand level, the date approval was made will appear on the Vendor Selection screen with a P preceding the date.

If payment is handled at the brand level, it should be approved as a regular vendor. No change/corporate pay register will appear.

Preliminary approval dates will appear on brand and chain/corporate-level screens. No P/R means the branch Pay Register is not yet available for approval. Chain/Corporate Pay Registers are identified on the selection screen as CORP.

The approval procedures for a branch or chain/corporate vendor is the same as previously explained for any vendor.

51846 7382

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- *Note:* Do not designate check handling for brand payment. This designation will be entered by the Manager with payment responsibility of the chain/corporate pay register.

Chain/corporate pay register cannot be adjusted. Any adjustments to this register must be entered at the branch level. Adjustments made at the brand level automatically recalculate this register.

The dollar amount display on the chain/corporate pay register is the total of all branches.

The chain/corporate pay register cannot be approved until all preliminary approvals have been made at the branch level.

- *Note:* The Contract Plan is not designated on Chain Corporate Pay Registers when a vendor operates with a combination of Contract Plans.

Additional Reports

To assist in vending results and placement tracking, two additional reports are available - the *Vending Placement Payment* report and the *Vending Placement Summary* report sent to your office automatically).

To request that the Vending Placement Payment Report be sent to your office.

1. At the Application Selection Menu, type "X" in front of PRINT REPORT and press [ENTER].

51846 7383

Copyright © R.J. Reynolds Tobacco Company 1993

2. At the Print Report Menu, type "X" in front of HISTORICAL REPORTING SELECTION and press [ENTER].

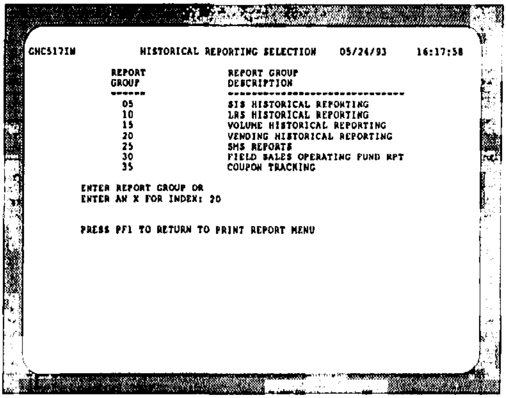
```
GHCMGOMN                    PRINT REPORT MENU                 05/24/93  16:16:48

_ DAILY SALES REP DETAIL CALL REPORT       _ MASTER ACCOUNT LIST
_ BRAND INVENTORY REPORT (*)               _ CHAIN MASTER ACCOUNT LIST
_ BRAND DISTRIBUTION REPORT (*)            _ WHOLESALE PRODUCT LINE LISTS
_ PROPOSED ALIGNMENT REPORT                _ BRAND DIST BY CALL CLASS (*)
_ ACCOUNT COVERAGE EXCEPTION REPORT        _ MONTHLY RETAIL COVERAGE REPORT
_ ACTIVITY SUMMARIES REPORT                _ CONTRACT SUMMARY REPORT
_ ACCOUNTS NOT CONTACTED REPORT            _ MERCH/ACCT MKT SUMMARY REPORT (*)
x HISTORICAL REPORT SELECTION MENU         _ CHAIN NON COMPLIANCE REPORT
_ REFERENCE SCREENS MANUAL                 _ SALES ADDRESS LABELS
_ CONTRACT PAYMENT-INQUIRY RPT             _ CHAIN STANDARD INFORMATION
_ CONTRACT PAYMENT-BY ACCOUNT NO.          _ MH-BRAND TO BRAND NAME REPORT
_ CONTRACT PAYMENT-ALPHABETICAL NAME       _ COUPON MANAGEMENT ACTIVITY DETAILS
_ CONTRACT PAYMENT-CHAIN BY TERRITORY      _ COUPON MANAGEMENT INVENTORY REPORTS
_ SCANNING DISPLAY REPORT                  _ CPN PLACEMENT/INVENTORY RECON RPT
_ CPN-MGT INTER-DIVISION TRANSFERS
          * THESE REPORTS WILL BE SCHEDULED FOR OVERNIGHT EXECUTION

_ CHECK THE STATUS OF A PREVIOUSLY SCHEDULED PRINT REPORT
_ CHECK THE STATUS OF A PREVIOUSLY SUBMITTED PRINT REPORT

PRESS PF1 TO RETURN TO THE SIS MAIN MENU
```

51846 7384

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. At the *Historical Reporting Selection* screen, type 20 after ENTER REPORT GROUP OR... and press [ENTER].



```
GHC517IN          HISTORICAL REPORTING SELECTION    05/24/93      16:17:58

                REPORT              REPORT GROUP
                GROUP               DESCRIPTION
                ------              ------------------------------
                  05                SIS HISTORICAL REPORTING
                  10                LRS HISTORICAL REPORTING
                  15                VOLUME HISTORICAL REPORTING
                  20                VENDING HISTORICAL REPORTING
                  25                SMS REPORTS
                  30                FIELD SALES OPERATING FUND RPT
                  35                COUPON TRACKING

           ENTER REPORT GROUP OR
           ENTER AN X FOR INDEX: 20

           PRESS PF1 TO RETURN TO PRINT REPORT MENU
```

4. At the *Vending Historical Reporting* screen, type 180 after ENTER REPORT NUMBER and press [ENTER]. Your report has been requested.

5. At this screen, you may also request the *Vending Quarterly Final Pay Register* by typing 170 after ENTER REPORT NUMBER and pressing [ENTER].

51346 7385

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7336

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

REQUESTING REPORTS

Summary

This section familiarizes the Systems Coordinator (SC) with procedures for requesting reports and retrieving information from the computer. The SC should also establish a print report schedule with the Region Operations Manager and be introduced to Data Grabber. Reports can be requested in two different ways:

1. Via SIS print report function (or)
2. As an end result of the main master list selection in SIS

Preliminary Activities

The SC should establish a print report schedule in for all Region Divisions. By scheduling each report, the SC will not be forced to constantly pull up repetitive reports — each will be printed at the time and place requested.

Master List Utilities

Master List Utilities can be organized into three areas:

- Obtaining scroll lists
- Manipulating scroll lists
- Printing reports and formatting

Most of this activity is accessed via the SIS Main Master List Account Selection Menu screen.

51846 7387

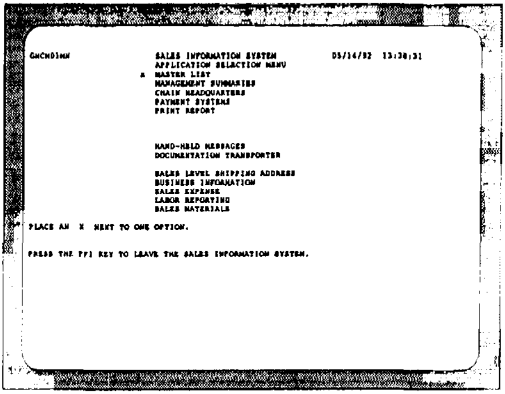
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3 REQUESTING REPORTS

Obtaining Scroll Lists

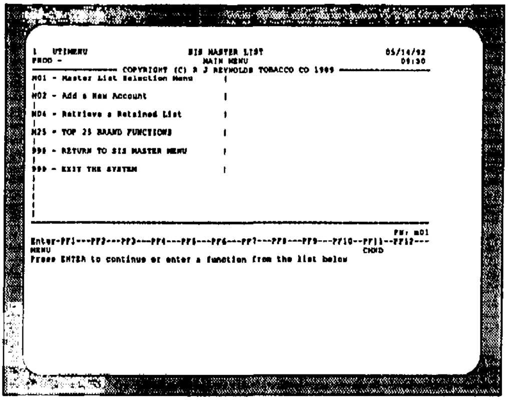
1. The main system utilized to gather account-specific information is the Master List function of SIS.



2. To logon, at the Application Selection Menu, type x in front of MASTER LIST and press [ENTER].

51846 7383

 Copyright © R.J. Reynolds Tobacco Company 1993



3. At FN: (lower right), type **M01** and press [ENTER].

51846 7389

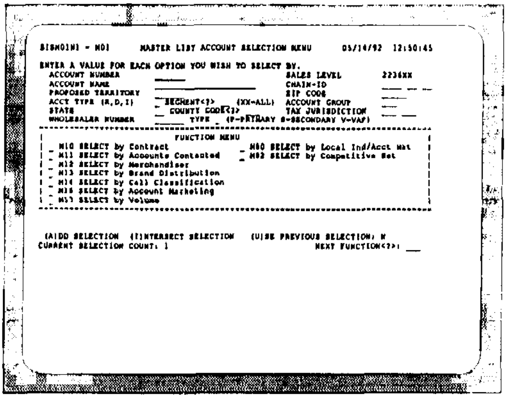
Master List Account Selection

This Master List Account Selection screen is the primary screen utilized to request reports, data, etc. Because the main RJR computer bank holds information for each account, the SC can inform the computer which accounts pull up by selecting one or more options. The SC tells the computer to generate the list of account s which reflect the criteria chosen. Following are two examples of how to utilize this screen.

Example 1

List of Direct Accounts

To obtain a list of Direct Accounts for a Region specify categories by which the computer will select the accounts.



1. At the Master List Account Selection Menu at ACCT TYPE, type d for DIRECT.

2. At SEGMENT <?>, type XX for all Direct Accounts. These actions inform the computer to select all Direct Accounts.

3. The Region number automatically appears at top right. To access information by:

   - REGION - Type first two digits of Region number after the sales number (e.g., if Minneapolis Region is 6300, type "63XXXX" after the sales level.)

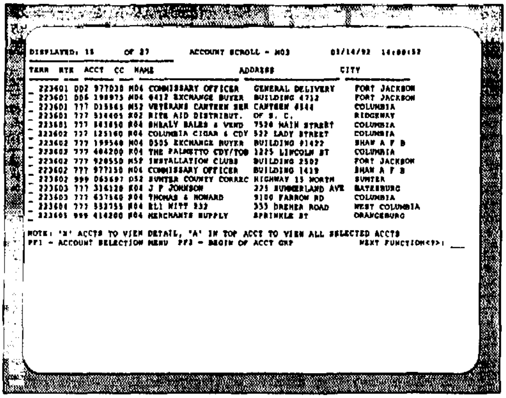
51845 7390

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- DIVISION - Type Division number XX after the sales level (e.g., 6326XX).
- ASSIGNMENT - Type Division and assignment after sales level (e.g., 632605).

4. To view the selected accounts on-line, press [ENTER]. An Account Scroll of Direct Accounts has been obtained. See page 3-8 for details on scroll list manipulation.


DISPLAYED: 15 OF 27 ACCOUNT SCROLL - H03 03/14/92 14:00:52

TERR	RTE	ACCT	CC	NAME	ADDRESS	CITY
223601	007	977030	H06	COMMISSARY OFFICER	GENERAL DELIVERY	FORT JACKSON
223601	005	198973	H04	0412 EXCHANGE BUYER	BUILDING 4712	FORT JACKSON
223601	777	015565	H52	VETERANS CANTEEN SER	CANTEEN 4544	COLUMBIA
223601	777	534405	R02	RITE AID DISTRIBUT.	OF S. C.	RIDGEWAY
223601	777	843050	R04	SHEALY SALES & VEND	7520 MAIN STREET	COLUMBIA
223602	777	125160	R04	COLUMBIA CIGAR & CDY	522 LADY STREET	COLUMBIA
223602	777	199540	H04	0505 EXCHANGE BUYER	BUILDING #1422	SHAW A F B
223602	777	404200	R04	THE PALMETTO CDY/TOB	1225 LINCOLN ST	COLUMBIA
223602	777	920550	H52	INSTALLATION CLUBS	BUILDING 2502	FORT JACKSON
223602	777	977150	H06	COMMISSARY OFFICER	BUILDING 1419	SHAW A F B
223602	999	065697	D52	SUMTER COUNTY CORREC	HIGHWAY 15 NORTH	SUMTER
223603	777	316120	R04	J P JOHNSON	225 SUMMERLAND AVE	BATESBURG
223603	777	637560	R04	THOMAS & HOWARD	9100 FARROW RD	COLUMBIA
223604	777	552755	R04	ELI WITT 232	555 DREHER ROAD	WEST COLUMBIA
223605	999	414200	R04	MERCHANTS SUPPLY	SPRINKLE ST	ORANGEBURG

NOTE: 'X' ACCTS TO VIEW DETAIL, 'A' IN TOP ACCT TO VIEW ALL SELECTED ACCTS
PF1 - ACCOUNT SELECTION MENU PF3 - BEGIN OF ACCT GRP NEXT FUNCTION<?>: ___

5. To print the report, type m70 at bottom right and press [ENTER].

6. Follow screen prompts. You will receive a list of all Direct Accounts in the operating unit. Refer to 3-17 (Report Menu section) for a complete overview of using the print report options.

51846 7391

Copyright © R.J. Reynolds Tobacco Company 1993

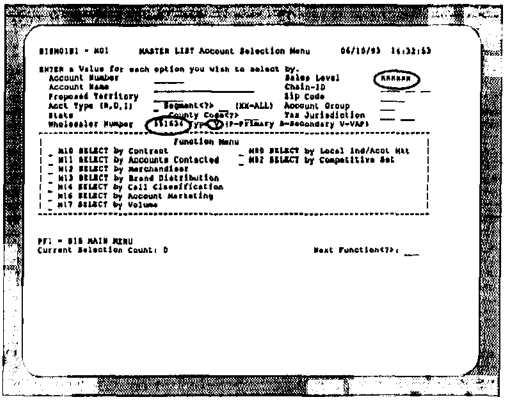
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Example 2

List of Retail Accounts Currently Participating in Specific VAP Program

1. At the Master List Account Selection Menu make the following entries and press [ENTER].

- WHOLESALER NUMBER - 551634
- TYPE - V signifies VAP wholesaler
- SALES LEVEL - XXXXXX

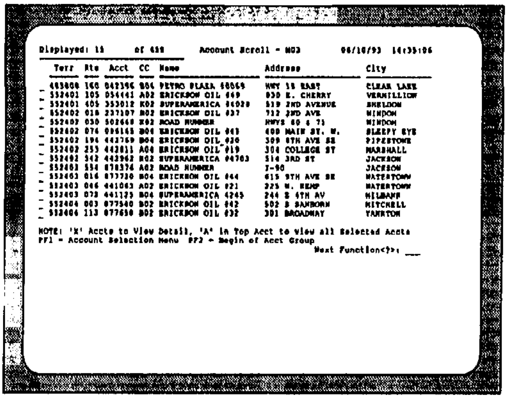


51846 7392

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. Again, the computer provides a list of accounts which fulfill the designated requirements.



Displayed: 15 of 455 Account Scroll - M03 06/10/93 14:35:06

Terr	Rte	Acct	CC	Name	Address	City
453800	160	042396	B04	PETRO PLAZA #0065	HWY 15 EAST	CLEAR LAKE
552401	105	054441	A02	ERICKSON OIL #49	830 E. CHERRY	VERMILLION
552401	405	353012	K02	SUPERAMERICA #4029	519 2ND AVENUE	SHELDON
552402	018	237107	B02	ERICKSON OIL #37	712 3RD AVE	WINDOM
552402	030	502440	E02	ROAD RUNNER	HWYS 60 & 71	WINDOM
552402	074	095145	B04	ERICKSON OIL #43	400 MAIN ST. W.	SLEEPY EYE
552402	194	442769	B04	ERICKSON OIL #30	309 8TH AVE SE	PIPESTONE
552402	253	442811	A04	ERICKSON OIL #19	304 COLLEGE ST	MARSHALL
552402	342	442962	B02	SUPERAMERICA #4703	514 3RD ST	JACKSON
552403	554	070374	A02	ROAD RUNNER	I-90	JACKSON
552403	016	077730	B04	ERICKSON OIL #44	615 9TH AVE SE	WATERTOWN
552403	046	441063	A02	ERICKSON OIL #21	325 W. KEMP	WATERTOWN
552403	073	441175	B04	SUPERAMERICA 4245	244 S 4TH AV	MILBANK
552404	003	077540	B02	ERICKSON OIL #42	502 S SANBORN	MITCHELL
552404	113	077650	B02	ERICKSON OIL #32	301 BROADWAY	YANKTON

NOTE: 'X' Accts to View Detail, 'A' in Top Acct to View all Selected Accts
PF1 = Account Selection Menu PF2 = Begin of Acct Group
Next Function<?>: ___

The two previous examples show the wide variety and combination of selections that can be made. Selection criteria available on the top portion of the Master List screen include:

- State
- Wholesaler number
- Zip Code
- Division
- Territory
- Region
- Chain ID

The SC can perform more intricate selections by placing an "X" next to the appropriate function at the Main Master List screen. Each of these functions explained below is accessed by typing "X" in the appropriate blank.

◆ *Note:* Multiple selections are allowed and often needed.

51846 7393

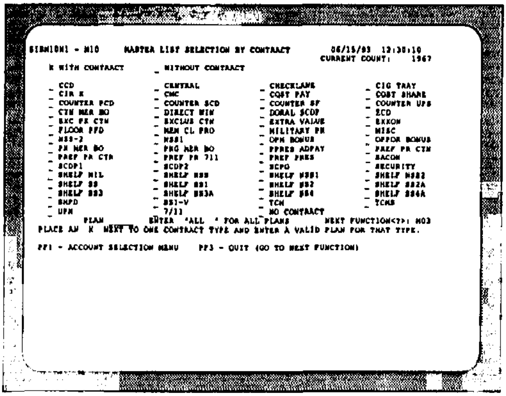
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M10 - Select by Contract

To utilize:

- Request whether accounts to be selected with contract or without contract by typing "X" in the appropriate blank.
- Select contract type desired. Only one contract type may be selected at a time.
- Enter which specific plan is desired or type "All" to request every plan available to a contract. (PCD4K selects a specific plan; "ALL" would select accounts with PCD4K or PCD3K or PCD2K and so on.)
- Press [ENTER] to view generated list.



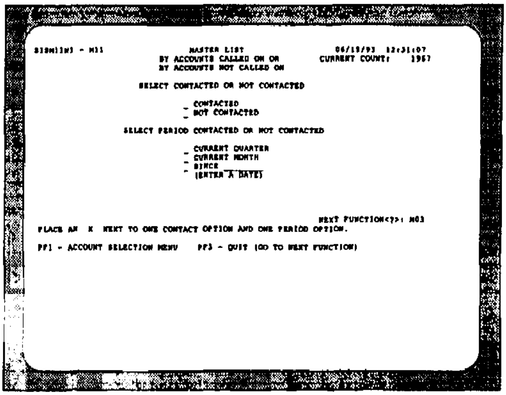
51846 7394

 Copyright © R.J. Reynolds Tobacco Company 1993

M11 - Accounts Called On/Not Called On

Two inputs are necessary:

- Request either Accts Contacted or Accts Not Contacted.
- Select the time period desired.
- Press [ENTER].



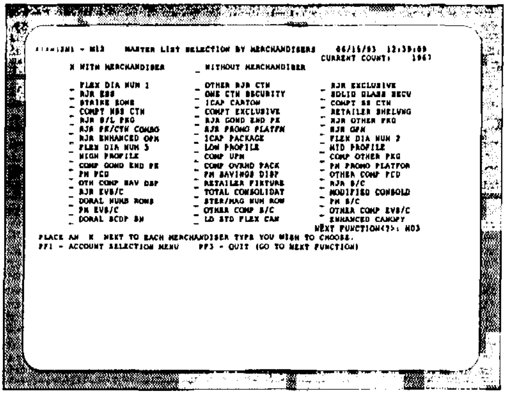
51846 7395

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M12 - Selection by Merchandisers

- Indicate whether selection is for accounts with or without merchandisers.
- Type "X" next to each merchandiser desired. Up to 40 may be chosen.
    - ♦ *Note:* If multiple merchandisers are selected, the account list will contain every call which has any of the requested merchandisers.
- Press [PF3] to generate the scroll list.
- *Press [ENTER] to scroll to the next merchandiser screen.*



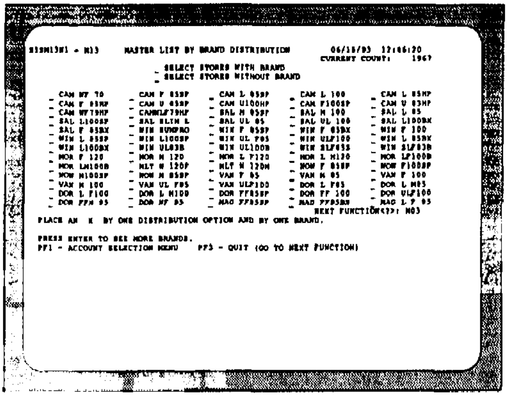
51846 7396

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M13 - List Brand by Distribution

- Select either stores with or without the desired brand.
- Type "X" next to the desired brand. Only one brand may be selected.

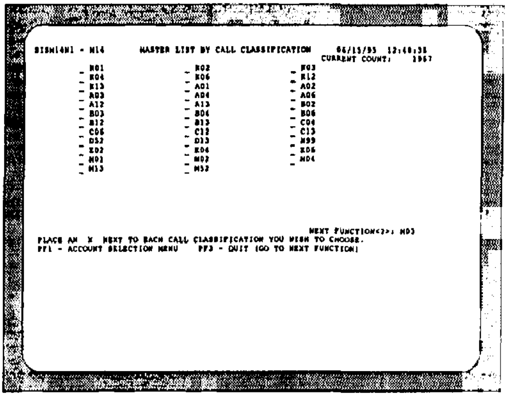


51846 7397

Copyright © R.J. Reynolds Tobacco Company 1993

M14 - Master List Call by Classification

- Type "X" next to each call classification desired.



- Below is a brief explanation of each classification.

51846 7398

 Copyright © R.J. Reynolds Tobacco Company 1993

Call Classifications Matrix

CLASS	VOLUME	FREQUENCIES
K CARTON OUTLET "KEY" CALL	MINIMUM - 176 CPW (51% of weekly sales are sold by the carton)	• 01 - Weekly • 02 - Biweekly • 03 - 4 times a quarter • 04 - Monthly • 06 - Twice a Qtr • 13 - Quarterly
A PACKAGE OUTLET	MINIMUM - 176 CPW	• 01 - Weekly • 02 - Biweekly • 03 - 4 times a quarter • 04 - Monthly • 06 - Twice a Qtr • 13 - Quarterly
B PACKAGE OUTLET	100-175 CPW	• 02 - Biweekly • 03 - 4 times a quarter • 04 - Monthly • 06 - Twice a Qtr • 13 - Quarterly
C PACKAGE OUTLET	76-99 CPW	• 04 - Monthly • 06 - Twice a Qtr • 13 - Quarterly
D PACKAGE OUTLET	1-75 CPW	• 13 - Quarterly • 52 - ANNUALLY
E ETHNIC AREAS	N/A	• 02 - BIWEELY • 04 - MONTHLY • 06 - TWICE A QUARTER
N99 NEW CALL	N/A	N/A
M MILITARY CALLS	N/A	• 01 - WEEKLY • 02 - BIWEEKLY • 04 - MONTHLY • 13 - QUARTERLY • 52 - ANNUALLY

51846 7399

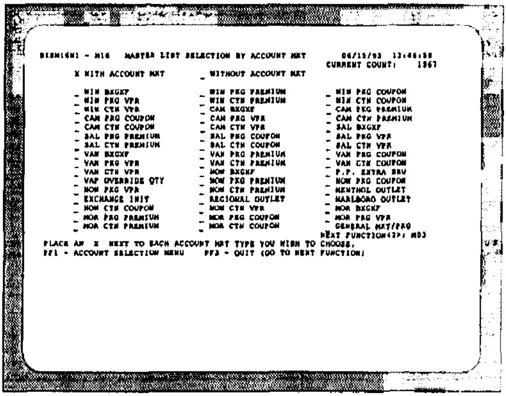
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M16 - Selection by Account Market

These are frequently used to change PP number indicators, value-added entries, etc.

- Select each account marketing type desired. As with the M12 screen, the list generated will be all accounts which possess any of the indicators selected.
- Press [ENTER] to continue.



```
RBSM16M1 - M16   MASTER LIST SELECTION BY ACCOUNT MKT        06/15/93  13:46:58
                                                     CURRENT COUNT:     1367
       X WITH ACCOUNT MKT          _ WITHOUT ACCOUNT MKT

       _ WIN BXGXF                 _ WIN PKG PREMIUM         _ WIN PKG COUPON
       _ WIN PKG VPR               _ WIN CTN PREMIUM         _ WIN CTN COUPON
       _ WIN CTN VPR               _ CAM BXGXF               _ CAM PKG PREMIUM
       _ CAM PKG COUPON            _ CAM PKG VPR             _ CAM CTN PREMIUM
       _ CAM CTN COUPON            _ CAM CTN VPR             _ SAL BXGXF
       _ SAL PKG PREMIUM           _ SAL PKG COUPON          _ SAL PKG VPR
       _ SAL CTN PREMIUM           _ SAL CTN COUPON          _ SAL CTN VPR
       _ VAN BXGXF                 _ VAN PKG PREMIUM         _ VAN PKG COUPON
       _ VAN PKG VPR               _ VAN CTN PREMIUM         _ VAN CTN COUPON
       _ VAN CTN VPR               _ NOW BXGXF               _ P.P. EXTRA SRV
       _ VAP OVERRIDE QTY          _ NOW PKG PREMIUM         _ NOW PKG COUPON
       _ NOW PKG VPR               _ NOW CTN PREMIUM         _ MENTHOL OUTLET
       _ EXCHANGE INIT             _ REGIONAL OUTLET         _ MARLBORO OUTLET
       _ NOW CTN COUPON            _ NOW CTN VPR             _ MOR BXGXF
       _ MOR PKG PREMIUM           _ MOR PKG COUPON          _ MOR PKG VPR
       _ MOR CTN PREMIUM           _ MOR CTN COUPON          _ GENERAL MKT/PKG
                                                     NEXT FUNCTION(?): MD3
PLACE AN  X  NEXT TO EACH ACCOUNT MKT TYPE YOU WISH TO CHOOSE.
PF1 - ACCOUNT SELECTION MENU    PF3 - QUIT (GO TO NEXT FUNCTION)
```

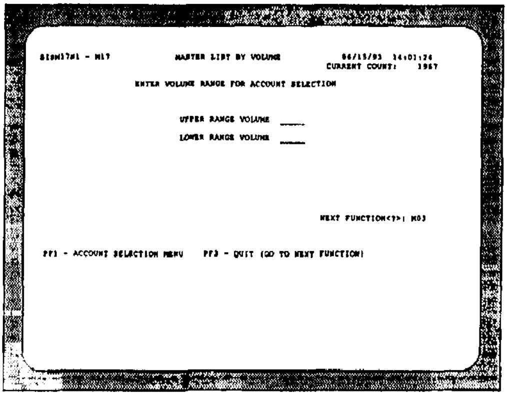
51846 7400

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M17 - Master List by Volume

- Indicate the range of volumes accounts will be selected by. Both must be entered.
- Press [PF3] to continue.



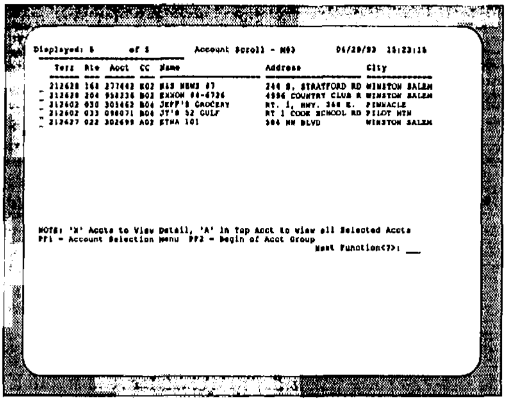
51846 7401

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M03 - Account Scroll

After making any selection from the M01 screen, the computer will provide an online list of accounts selected. The number of accounts selected will be displayed at the top of the screen. If there are more accounts than can be displayed on the screen, you may scroll through the accounts by pressing [ENTER]. These accounts may be used for a variety of functions (i.e., Manpower Analysis, Reports, Report Format, or viewing account level detail). For a list of available functions, enter "?" in the NEXT FUNCTION field and press [ENTER].



Options:

- You may select the entire account scroll list by entering a function number and pressing [ENTER].
- You may select individual or multiple accounts by entering an "X" next to the account. This process may be continued to the next screen by pressing [ENTER]. When your selection is complete, enter a function number and press [ENTER].
- [PF1] returns you to the Master List Selection screen. [PF2] returns you to the beginning of your selection.
  - *Note:* PF2 will bring you to the beginning of your selection but will eliminate any accounts with a previous "X" or selected.

51846 7402

 Copyright © R.J. Reynolds Tobacco Company 1993

Scroll List Manipulation

Now that you have an account scroll list, there are numerous functions that you can perform against the scroll list. Here is a list of available functions that you can perform by typing the function code in the NEXT FUNCTION field and pressing [ENTER].

M01 Master List Selection Menu
M04 Retrieve a Retained List
M10 SELECT a Contract
M11 SELECT by Accounts Contracted
M12 SELECT by Merchandiser
M13 SELECT by Brand Distribution
M14 SELECT by Call Classification
M16 SELECT by Account Marketing
M17 SELECT by Volume
M31 VIEW Standard Account Info
M32 VIEW VAP Promotions
M33 VIEW Part Time Data
M34 VIEW Calls Made by Month
M35 VIEW Contracts
M36 VIEW Brand Distribution
M37 VIEW Merchandisers
M38 VIEW Temporary Displays
M39 VIEW Territory Alignment
M50 Hold List Selection
M70 Print Report Menu
M71 Manpower Analysis
M72 Update Activity
M73 Mass Update VAP Promotions

REMEMBER: The above information can be obtained by typing "?" at the function prompt.

You will have noticed that the SELECT functions that were on the M01 screen are also available from the scroll list (M03). They are available if you would like to select a subset of the scroll list without going back to the Account Selection Screen (M01). If you choose to run a SELECT function from the scroll list, a new scroll list will be displayed which is a subset of the original scroll list.

Each of the above functions that have not been discussed up to this point will be described in detail on the following pages.

The following are functions available once scroll list has been obtained.

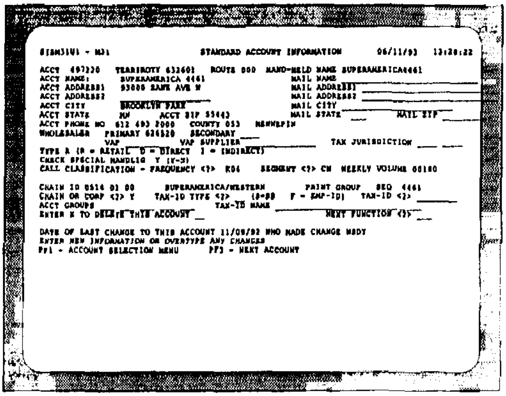
51846 7403

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M31 - View/Update Standard Account Information

This function allows you to display or update (limited by security access) all account-specific static information.



Field Descriptions

- **ACCOUNT NUMBER** (nnnnnn) - The number assigned to each customer/account.
- **TERRITORY** (xxxxxx) - The numeric geographical definition of the domestic field sales organization.
- **ROUTE** (nnn) - The number assigned by the Sales Representative. This number helps the Sales Rep organize his/her accounts.
- **HAND-HELD NAME**- The shortened account name that is loaded to the hand-held computer. Maximum of 16 characters allowed.
- **ACCT NAME/ACCT ADDRESS1/ACCT ADDRESS2/ACCT CITY/ACCT STATE/ACCT ZIP** - Account name and location.
- **MAIL NAME/MAIL ADDRESS1/MAIL ADDRESS2/MAIL CITY/MAIL STATE/MAIL ZIP** - These fields provide an alternative mailing name/address for checks or other mailings.
- **ACCT/MAIL NAME** - The assigned account name. Maximum of 20 characters allowed.

51846 7404

 Copyright © R.J. Reynolds Tobacco Company 1993

- **ACCT/MAIL ADDRESS1** - (20 characters allowed) - First line of account address.
- **ACCT/MAIL ADDRESS2** (20 characters allowed) - Second line of account address.
- **ACCT/MAIL CITY** 15 characters allowed) - Valid city recognized by the US Postal Service.
- **ACCT/MAIL STATE** (xx) - Valid State recognized by the US Postal Service.
- **ACCT/MAIL ZIP** (nnnnn) - Valid zip code recognized by the US Postal Service.

  ◆ *Note:* Account and Mailing City, State and Zip Code combinations are validated by the US Postal Service. Hint: If you are unsure of a city, state, zip code combination, enter a valid zip code and press [[ENTER], A window will appear that displays all valid combinations. Select the correct combination with "X" and press [ENTER]. The city, state and zip code will automatically be inserted into the field.

- **ACCT PHONE NO** (nnn nnn nnnn) - The telephone number assigned to the account.
- **COUNTY** (nnn) - The code automatically assigned by the system.
- **PRIMARY WHOLESALER** (nnnnnn) - The direct account that provides products/services to the retail account.
- **SECONDARY WHOLESALER** (nnnnnn) - The direct account that provides products/service to the retail accounts.
- **VAP** (Value Added Program) Wholesaler (nnnnnn) - The direct account that delivers product and promotions directly to the retail account.
- **VAP SUPPLIER** (10 characters allowed) - The account number that the direct account/wholesaler has assigned to the retail account.
- **TAX JURISDICTION** (xxx xxx) - The indicator used to group multiple accounts within a tax jurisdiction, such as a township. You may enter two tax jurisdictions.
- **TYPE** (x) -Valid types are:
  - R - Retail - Sells directly to the consumer
  - D - Direct - Purchases from RJR and sells to retail accounts
  - I - Indirect - Purchases from direct accounts and sells to small retail accounts

51846 7405

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **CHECK SPECIAL HANDLING (Y-N)** - (x) - If "Y" check will be sent to responsible Chain Manager or Division Manager. If "N", check will be sent to payee.

- **CALL CLASSIFICATION-FREQUENCY** <?> (xnn) - The first character is the call classification. It is assigned by field sales based on volume. "K" accounts are carton outlets. The remainder (A,B,C, etc.) are package outlets. Frequency, the last two numbers indicate how often the account is called on by the sales representative. "01" weekly, "02" biweekly, etc. For frequency definitions, enter a "?" in the first position of the field and press [ENTER].

- **SEGMENT** <?> (xx) - The class of trade definition assigned to the account, such as convenience store, drug store and gas station. For segment definitions, enter a "?" in the first position of the field and press [ENTER].

- **WEEKLY VOLUME** (nnnnn) - All companies weekly carton cigarette volume. This volume is entered by the Sales representative.

- CHAIN ID - (nnnn nn nn) - The chain ID number that associates a group of accounts to a chain. The following are the accepted options for this field:

  - Headquarters Level (1012 xx xx) - Four digits followed by four x's.
  - Second Level (1012 01 xx) - Six digits, followed by two x's
  - Specific chain (1012 01 01) - Eight digit chain ID number

- PRINT GROUP/SEQ (xx xxx) - Defined by the Chain Account Manager or the Division Manager with chain payment responsible in the Chain Headquarters screen. These fields control the print sequence in the Contract Pay Register.

- **CHAIN OR CORP** <?> (x) - *This field defines the status of the account for IRS* purposes. For further definitions, enter a "?" and press [ENTER].

- **TAX ID TYPE** <?> (x) - This field indicates whether Tax-ID is a social security number or federal tax ID. For further definition, enter a "?" and press [ENTER].

- **TAX ID** >?> (x) - The Tax-ID supplied to the IRS. For further definition, enter a ">" and press [ENTER].

- **ACCT GROUPS** (xxx xxx xxx xxx xxx) - The indicator use to group multiple accounts. This indicator is assigned to an account by Field Sakes.

- **TAX ID NAME** (x - 30 - x) - The name as it appears on the account's social security card or IRS form 8501.

- **ENTER 'X' TO DELETE THIS ACCOUNT** (x) - Placing an "X" and pressing [ENTER] in this field will remove this account from the SIS program.

51846 7406

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **NEXT ACCOUNT** - Enter the SIS account number of the next account to be viewed/updated.
- **DATE OF LAST CHANGE TO THIS ACCOUNT** - Display field indicating when this account was last modified.
- **WHO MADE CHANGE** - Display field indicating who made the last change to this account.
- **OPTIONS** - Enter or overtype the new information and press [ENTER] to make changes.
- **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].

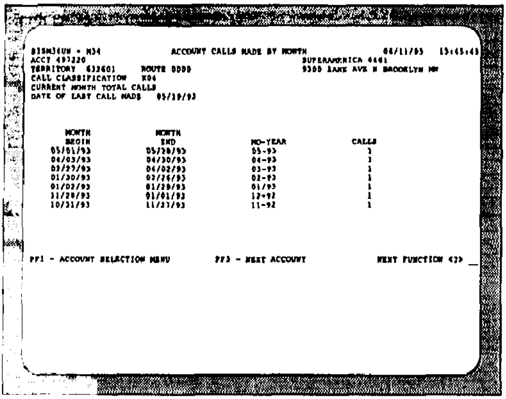
PF Keys

Valid PF keys are:

- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.

M34 - Account Calls Made by Month

This function allows viewers to see how many times per month a call has been made during the last year.



01SM34UN - M34 ACCOUNT CALLS MADE BY MONTH 05/11/93 13:45:45
ACCT 497220 SUPERAMERICA 4461
TERRITORY 632601 ROUTE 0000 9300 LANE AVE N BROOKLYN MN
CALL CLASSIFICATION X04
CURRENT MONTH TOTAL CALLS
DATE OF LAST CALL MADE 05/19/93

MONTH BEGIN	MONTH END	MO-YEAR	CALLS
05/01/93	05/28/93	05-93	1
04/03/93	04/30/93	04-93	1
02/27/93	04/02/93	03-93	1
01/30/93	02/26/93	02-93	1
01/02/93	01/29/93	01/93	1
11/28/93	01/01/93	12-92	1
10/31/93	11/27/93	11-92	1

PF1 - ACCOUNT SELECTION MENU PF3 - NEXT ACCOUNT NEXT FUNCTION <?> ___

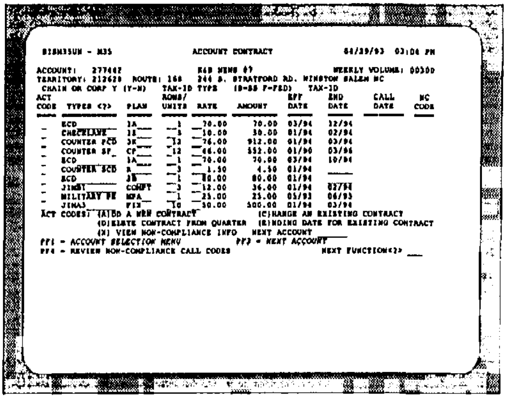
51846 7407

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M35 - View/Update Contracts

This function allows you to view and update (limited by security) a contract for an account.



Field Descriptions

- **ACT CODE** (x) - This code is used to perform an activity on a contract. See the bottom of the Account Contract screen for valid options.
- **TYPE** (x -1 - x) - Identifies the type of RJR contract for the account.
- **PLAN** (xxxxx) - Identifies the type of plan associated with a contract. There may be multiple plans for a given contract.
- **ROWS/UNITS** (nnn) - The number of rows or units to be maintained by RJR on a merchandiser for this contract.
- **RATE** (x - 7 - x) - The contracted amount established for each row.
- **AMOUNT** - The total amount of the contract calculated by multiplying rows/units by the rate.
- **EFF DATE** (mm-yy) - The effective start date of the contract. Starts the first day of the month.
- **END DATE** (mm-yy) - The expiration date of the contract. Ends the last day of the month.

51846 7408

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **CALL DATE** - The last date a Sales Rep made a call on this account.
- **NC CODE** - Reason code for contract non-compliance.
- **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].

PF Keys

Valid PF keys are:

- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.
- [PF4] - Displays the list of non-compliance call codes.

51846 7409

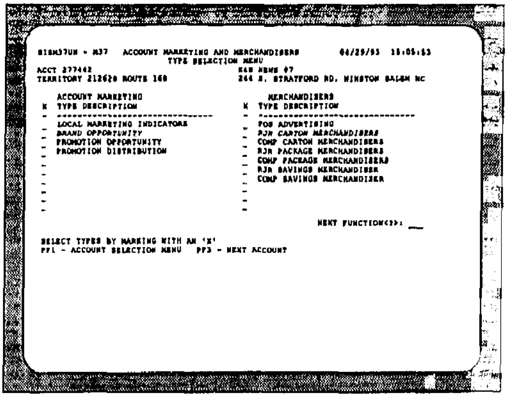
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M37 - View/Update Merchandiser/ Account Marketing

The first screen of this function allows you to view the account marketing and merchandiser information associated with an account. To view the second screen, place an "X" beside the Account Marketing Type(s) or Merchandiser Type(s) to be viewed and press [ENTER].

Screen 1



Field Descriptions

- **NEXT ACCOUNT** - *Enter the SIS account number of the next account to be viewed/updated.*
- **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].

PF Keys

Valid PF keys are:

- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.

51846 7410

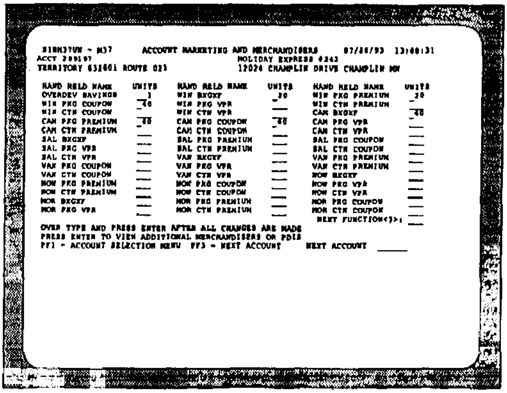
 Copyright © R.J. Reynolds Tobacco Company 1993

Screen 2

The second screen allows you to view or update the account marketing and/or merchandiser information selected from this prior screen.

Screen 2

In this screen, *Promotion Opportunity* was selected.



SIBN3TUN - M37 ACCOUNT MARKETING AND MERCHANDISERS 07/44/93 13:40:31
ACCT 209197 HOLIDAY EXPRESS 4243
TERRITORY 632401 ROUTE 023 12024 CHAMPLIN DRIVE CHAMPLIN MN

HAND HELD NAME	UNITS	HAND HELD NAME	UNITS	HAND HELD NAME	UNITS
OVERDEV SAVINGS	1	WIN BXGXF	20	WIN PKG PREMIUM	20
WIN PKG COUPON	40	WIN PKG VPR		WIN CTN PREMIUM	
WIN CTN COUPON		WIN CTN VPR		CAM BXGXF	40
CAM PKG PREMIUM	40	CAM PKG COUPON	40	CAM PKG VPR	
CAM CTN PREMIUM		CAM CTN COUPON		CAM CTN VPR	
SAL BXGXF		SAL PKG PREMIUM		SAL PKG COUPON	
SAL PKG VPR		SAL CTN PREMIUM		SAL CTN COUPON	
SAL CTN VPR		VAN BXGXF		VAN PKG PREMIUM	
VAN PKG COUPON		VAN PKG VPR		VAN CTN PREMIUM	
VAN CTN COUPON		VAN CTN VPR		NOW BXGXF	
NOW PKG PREMIUM		NOW PKG COUPON		NOW PKG VPR	
NOW CTN PREMIUM		NOW CTN COUPON		NOW CTN VPR	
NOR BXGXF		NOR PKG PREMIUM		NOR PKG COUPON	
NOR PKG VPR		NOR CTN PREMIUM		NOR CTN COUPON	

NEXT FUNCTION<3>:

OVER TYPE AND PRESS ENTER AFTER ALL CHANGES ARE MADE
PRESS ENTER TO VIEW ADDITIONAL MERCHANDISERS OR PDIS
PF1 - ACCOUNT SELECTION MENU PF3 - NEXT ACCOUNT NEXT ACCOUNT

Field Descriptions

- **HAND HELD NAME** - The abbreviated description of the indicator as seen in the handheld computer.
- **UNITS** (nnn) - Enter the appropriate quantity.
- **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].
- **NEXT ACCOUNT** - Enter the SIS Account Number of the next account to be viewed/updated.

PF Keys

Valid PF keys are:

- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.

51846 7411

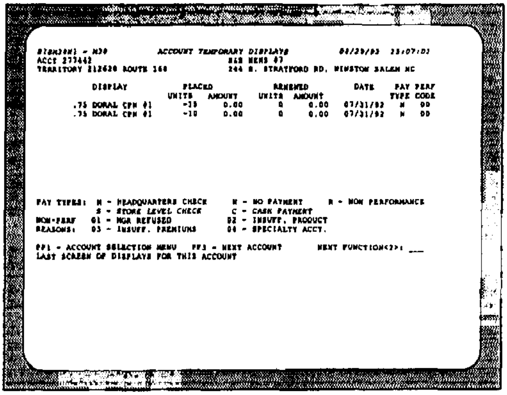
Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M38 - View/Update Temporary Displays

This function allows you to view and update the temporary displays of an account. It is also used to verify whether a double entry has occurred when correcting a draft error. Any double entries, once verified, should be corrected using the M70 function.

Screen 1



Field Descriptions

- **ACT** - Not applicable.
- **DISPLAY** - The display description.
- **UNITS PLACED** - The number of units placed.
- **PLACED AMOUNT** - The number of units placed multiplied by the display rate.
- **RENEWED UNITS** - Not applicable.
- **RENEWED AMOUNT** - Not applicable.
- **DATE** - The date of placement.
- **PAY TYPE** - The type of payment transaction for this display. Valid pay types are displayed at the bottom of the screen.

51846 7412

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **PERF CODE** - The reason for non-performance. Valid non-performance reasons are displayed at the bottom of the screen.
- **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].

PF Keys

Valid PF keys are:

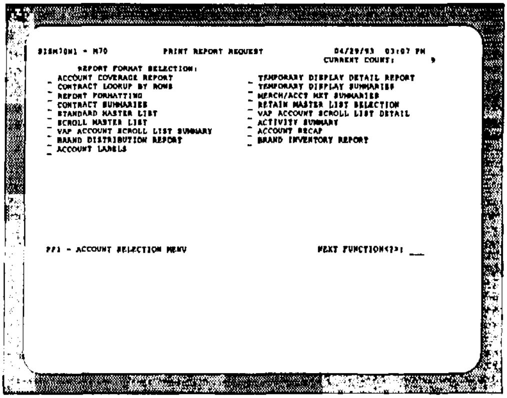
- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.

M70 - Print Report Menu

Once a list of accounts has been generated and manipulated, a print report can be generated by typing M70. This function provides a menu of reports that may be requested by the account selected from the scroll list. This document will describe each report, provide instructions for submitting the report and display an example of the report.

◆ *Note:* In each case of reports that follow, it is important to verify the destination.

Screen 1



51846 7413

Copyright © R.J. Reynolds Tobacco Company 1993

3

REQUESTING REPORTS

Two options are provided to increase the functionality and appearance of each of these requested reports. Reports can be printed in Winston-Salem on one or two sides of each page. Suggested uses for WS Printing are:

- When the volume of reports will be so great as to clog up valuable printer time
- When reps request printing on one or two sides

To utilize these options, at any destination prompt:

- Type 9700 for one-sided print.
- Type 9701 for two-sided print.

51346 7414

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Account Coverage Report

This report provides the total number of retail accounts by call class/frequency and the number of those retail accounts that were not called on in the specified month. The call class frequencies are grouped with subtotals for monthly calls, quarterly calls, and all others.

How to Use

1. Place an "X" beside the Account Coverage Report option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed and a brief report title. Press [ENTER].
3. Select the month for which this account coverage report should run by entering a valid report month number and press [ENTER].
4. Your report request is submitted and will print at the designated print location as soon as possible.

RIS136B1 ACCOUNT COVERAGE REPORT 04/30/93 PAGE 1
MASTER LIST SELECTION
REGULAR RESPONSIBILITY

SAMPLE REPORT

CALL CLASS	RETAIL ACCOUNTS	MARCH ACCOUNTS NOT CONT	PERCENT CONTACTED	QUARTER ACCOUNTS NOT CONT	PERCENT CONTACTED
R01	0	0	0.0	0	0.0
A01	0	0	0.0	0	0.0
M01	0	0	0.0	0	0.0
R02	0	0	0.0	0	0.0
A02	1	0	100.0	0	100.0
B02	1	0	100.0	0	100.0
E02	0	0	0.0	0	0.0
M02	0	0	0.0	0	0.0
R03	0	0	0.0	0	0.0
A03	0	0	0.0	0	0.0
B03	0	0	0.0	0	0.0
R04	0	0	0.0	0	0.0
A04	1	0	100.0	0	100.0
B04	1	0	100.0	0	100.0
C04	0	0	0.0	0	0.0

51846 7415

Copyright © R.J. Reynolds Tobacco Company 1993

Temporary Display Detail Report

This report displays placement activity for a selected display with specified time period for accounts selected in the scroll list.

How to Use

1. Place an "X" beside the *Temporary Display Detail Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed and a brief report title. Press [ENTER].
3. Select the date range in month/day/year format and place an "X" beside the type of report and press [ENTER]. The system will prompt you with a message to verify that the data entered is correct. Press [PF8] to continue.
4. Select one display by placing an "X" beside the entry and press [ENTER]. You may also scroll more displays by pressing [ENTER]. Press [PF7] to redisplay all displays beginning with the first screen.
5. A verification screen will be displayed for all options chosen. Press [ENTER] to print the report or [PF1] to return to the Print Report menu.
6. You report request is submitted and will print at the designated print location as soon as possible.

A sample report is on the following page.

51846 7416

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

GHCP29RN TEMPORARY DISPLAY REPORT 08/02/

-- CHAINS -- STORES WITH DISPLAY

DISPLAY: WIN SP 40PK/DB FROM: 05/01/93 TO: 08/01/93

CHAIN ID: 5183-00-00 - BROOKS FOODS, INC

GROUP	TERR	ACCOUNT	NAME	ADDRESS	UNITS
	632601	473786	BROOKS' FOODS #3	OSSEO, MN	1
	632601	582764	BROOKS' FOODS #7	BROOKLYN PARK, MN	1
	632602	572314	BROOKS' FOODS #6	HAM LAKE, MN	1
	632610	451833	BROOKS' FOODS #2	MINNEAPOLIS, MN	1
					1
					2

GHCP29RN TEMPORARY DISPLAY REPORT 08/02/

-- CHAINS -- STORES WITH DISPLAY

DISPLAY: WIN SP 40PK/DB FROM: 05/01/93 TO: 08/01/93

CHAIN ID: 5183-00-00 - BROOKS FOODS, INC

*************** SUMMARY ***************

*************** SUMMARY ***************
*************** SUMMARY ***************

*** REQUESTED STORES FOR SALES LEVEL - XXXX

*** PAYMENT TYPE TOTALS FOR - WIN SP 40PK/DB RATE= 5.00

STORES			UNITS	AMOUNT
3	DUE HEADQUARTERS (H)	=	3	15.00
	PAID STORE LEVEL (S)	=		
1	NO PAYMENT (N)	=	2	
	TOTAL	=	5	15.00

TOTAL STORES IN CHAIN	=	7
STORES WITH DISPLAY	=	4
STORES WITHOUT DISPLAY	=	3

51846 7417

Contract Lookup by Rows

This report displays the number of stores with SHELF SS1 contracts by a user-specified row range and plan. The report will also display a scroll list of the accounts that contain the SHELF SS1 contract by plan and number rows.

How to Use

1. Place an "X" beside the *Contract Lookup by Rows Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Enter the number of row ranges for this report. You may specify up to ten different range values in ascending order. A scroll list of the accounts may also be obtained by entering an "X" beside the Print Detail Scroll Master List option. After all entries are made, press [ENTER].
4. Your report request is submitted and will print at the designated print location as soon as possible.

51846 7418

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

	PLAN			
	BXXXX	B1XXX	CXXXX	DXXXX
	STORES	STORES	STORES	STORES
ROW RANGE				
31-40	2	.	.	1
41-50	2	.	8	5
51-60	4	.	26	14
61-70	1	1	15	38
71-80	.	.	33	22
81-90	.	.	.	2
91-100	.	.	2	8
101-110	.	.	2	5
111-120	.	.	.	4

51846 7419

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Temporary Display Summaries

This two-part report provides promotional activity for current month plus three prior months. Report one is a summary of promotions placed and amounts by month. Report two provides the total number of stores each promotion was placed in and the average weekly carton volume.

How to Use

1. Place an "X" beside the *Temporary Display Summaries Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

MASTER LIST ACCOUNT SELECTION 11:47 Friday, April
TEMPORARY DISPLAY SUMMARIES

	NUMBER OF STORES	AVG WEEKLY CARTON VOLUME
SA $1/2PK CPN	1	110.00
DORAL .30 CPN	1	110.00
STERL $3.00 VPR	1	450.00
DORAL .35 CPN	1	110.00
DORAL .30 VPR	1	110.00
SA $1/2PK CPN	1	110.00
DORAL .30 CPN	1	110.00
STERL $3.00 VPR	1	450.00
DORAL .35 CPN	1	110.00
DORAL .30 VPR	1	110.00
DORAL $3.00 VPR	1	450.00
MAGNA .30 VPR	1	110.00
MAGNA $3.00 VPR	1	450.00
FORS RET13 .80	1	110.00
SA $3 CTN CPN	1	450.00
VA $3 CTN CPN	1	450.00

51846 7420

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Report Formatting

This function provides the ability to create a report with user-defined options. The final report resembles a spreadsheet with the row and column designations defined by the user and each cell block containing the number of accounts. The option also exists for calculating total carton volume and average weekly carton volume for each cell block.

How to Use

1. Place an "X" beside the Reporting Formatting option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. A screen will be displayed with all valid row and column options. Each row and column may have one or two options. Select the variables for the report with an "X" and press [ENTER]. If TOTAL or AVERAGE is selected, they will be placed in the cell blocks along with the total number of accounts. For example, the screen list selected contains a Region. To format the report with Division/Territory as a row option and call class/frequency as the column option, select DIVISION, TERRITORY, CALL CLASS, CALL FREQ and press [ENTER].
4. The report is ready to be formatted with the options selected on the previous screen. Place each option by number in the appropriate print location and press [ENTER]. For example, the previously selected options could be placed on the report as follows:

   CALL CLASS
   CALL FREQ

   DIVISION TERRITORY

51846 7421

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. This screen will display the format of your report. Press [ENTER] to submit *the report or [PF1] to return to the variable selection screen.*

6. Your report request is submitted and will print at the designated print location as soon as possible.

SIS 16:06 Friday, April 30, 1993 1

	TERR	
	212401	
	CALL CLASS	
	K	
	CARTON VOLUME	
	STORES	TOTAL
CONTRACT		
ECD	1	750
NSS-2	1	350

51845 7422

 Copyright © R.J. Reynolds Tobacco Company 1993

Merch/Acct Mkt Summaries

This report provides the total number of units by Merchandiser/Account Marketing description for accounts selected in the Account Scroll list.

How to Use

1. Place an "X" beside the *Merch/Acct Mkt Summaries Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

```
SIS66081            MERCHANDISER SUMMARY                04/30/93
TITLE: SAMPLE REPORT
TOTAL STORES IN SELECTION     15
          DESCRIPTION                    NUMBER
        OTHER RJR CTN                       2
        RJR ESS                             1
        ONE CTN SECURITY                    1
        SOLID GLASS SECURITY                2
        ICAP CARTON                         1
        FLEX DIA NUM 1                    745
        RETAILER SHELVING                   2
        RJR S/L PKG                         1
        RJR OTHER PKG                       2
        RJR PROMO PLATFORM                  2
        RJR OPM                             2
        RJR ENHANCED OPM                    1
        LOW PROFILE                         1
        MID PROFILE                         1
        HIGH PROFILE                        2
        COMP UPM                            1
        COMP OTHER PKG                      1
        COMP OVRHD PACK                     2
```

51846 7423

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Contract Summaries

This report displays the number of contracts and total units for each contract type/plan for the accounts selected.

How to Use

1. Place an "X" beside the *Contract Summaries Report* and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

MASTER LIST SELECTION 1
CONTRACT SUMMARIES 13:29 Friday, April 30, 1993

NUMBER OF STORES IN SELECTION: 15

	NUMBER OF CONTRACTS	TOTAL UNITS	IN EFFECT	NOT IN EFFECT
CONTRACT				
CCD CCD1	1	1	1	0
CCD CCD2	1	1	1	0
CCD DOR	2	2	2	0
CCD 12	1	1	1	0
COUNTER PCD3K	2	2	2	0
COUNTER PCD4K	1	1	1	0
CCD CCD2	1	1	1	0
CCD DOR	2	2	2	0
CCD 12	1	1	1	0
COUNTER PCD3K	2	2	2	0
COUNTER PCD4K	1	1	1	0
COUNTER PCD4L	1	1	1	0
ECD 2B	1	1	1	0
EXTRA VALUEEVD	3	3	3	0
NSS-2 WDXXX	1	100	100	0
PREF PR CTNPPND	1	1	1	0

51846 7424

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Standard Master List

This report provides a detailed description of each account. Information contained on this report includes account address, wholesaler information, contract and merchandising information, etc. This report is commonly used by the Sales Representative as an informational tool.

How to Use

1. Place an "X" beside the *Standard Master List Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

```
GHC724BH                           MASTER  ACCOUNT  LIST       04/30/93
                                  HAND-HELD NAME  CLASS-FREQUENCY
ACCOUNT   NAME & ADDRESS            CHAIN-ID       WEEKLY VOLUME   MERCHDSR
 ROUTE    TELEPHONE                CHAIN NAME          TYPE        ACCT MKT OR
          ACCOUNT GROUPS          CORP? / TAX ID    SEGMENT        CONTRACT      UNIT
          MONTHLY CALL COUNT TAX-ID NAME
                                  PRI WHOLESALER ACCT & NAME
                                  SEC WHOLESALER ACCT & NAME
                                  VAP WHOLESALER ACCT & NAME
-----------------------------------------------------------------------------------
                                                                 CLOCK/LTD SIGN      1
        JAN FEB MAR APR                                          COUNTER PCD3K       1
          1   1   1   1                                          EXTRA VALUEEVD      1
                                                                 CCD         DOR     1

TERRITORIES
212401(REG)    212421 K01
800225  FOOD LION #54            FOOD LION #54        K07        SOLID GLASS SECU    1
        3615 NEW BERN AVE.       0502-00-00            750       FLEX DIA NUM 1    165
 000    RALEIGH                  FOOD LION            R          HIGH PROFILE        1
        NC  27610                CORP - YES           SH         COMP OTHER PKG      1
                                                                 TOTAL CONSOLIDAT    1
        919-834-0518             557563 FOOD LION WHSE. #4       DORAL NUMB ROWS    16
        WED                                                      STER/MAG NUM ROW   16
        JAN FEB MAR APR                                          ENHANCED CANOPY     1
          1   1   1   1                                          WINSTON             2
                                                                 SALEM               1
                                                                 OVERDEV SAVINGS     1
                                                                 WIN PKG COUPON     40
                                                                 WIN CTN COUPON     25
                                                                 SAL PKG COUPON     50
                                                                 SAL CTN COUPON     50
                                                                 GENERAL MKT/CTN     1
                                                                 P.P. CTN            1
                                                                 TEMP F.D.           1
                                                                 COUPON ACCOUNT      1
```

51846 7425

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

VAP Account Scroll List Detail

This report provides a worksheet used to analyze accounts for the Value Added delivery process. The worksheet consists of VAP Wholesaler Number, PP1, PP2, PP3 and VAP Override quantities.

How to Use

1. Place an "X" beside the Reporting Formatting option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

A sample report is on the following page.

51846 7426

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

GHC725WR VAP ACCOUNT SCROLL LIST DETAIL REPORT 06/16/93

HUB CITY FOOD, INC. 551034

SUPPLIER	ACCOUNT	TERR	NAME	ADDRESS	CITY	ST	FF#1	FF#2	FF#3	EXTRA SKU'S	FF TOTAL	VAP OVR	VAP ALLOC	DIV ALLOC
1044	612825	632601	TWIN CITY WEST	HWY 101 & I94	ROGERS	MN	1	0	0	0	1	0	1	0
0029	002295	632601	PUMP N MUNCH	300 BROADWAY BOX 677	MONTICELLO	MN	1	0	0	0	1	0	1	0
0013	236473	632603	PUMP N MUNCH	2514 BROADWAY AVE NE	MINNEAPOLIS	MN	0	1	0	0	2	0	2	0
1540	072984	632605	ERICKSON OIL #40	729 10TH ST	GLENCOE	MN	0	0	1	0	3	0	3	0
1513	237056	632606	ERICKSON OIL #13	11 4TH AVE NE	HUTCHINSON	MN	0	1	0	0	2	0	2	0
1544	063703	632606	ERICKSON OIL #44	HWY 15	HUTCHINSON	MN	0	0	1	0	3	0	3	0
5740	360622	632606	SUPERAMERICA	301 10TH AVE. SO.	BUFFALO	MN	1	0	0	0	1	0	1	0
1049	635972	632606	CIRCLE C FOODS	HWY 24 & INT. 94	CLEARWATER	MN	0	1	0	0	2	0	2	0
1044	033315	632607	CIRCLE C FOODS	336 JACKSON	ELK RIVER	MN	0	1	0	0	2	0	2	0
1043	612846	632607	CIRCLE C FOODS	560 DODGE AVENUE	ELK RIVER	MN	0	1	0	0	2	0	2	0
2044	612856	632607	CIRCLE C FOODS	NO HWY 169	ZIMMERMAN	MN	0	1	0	0	2	0	2	0
0017	410985	632609	PUMP N MUNCH	3601 NOBLE AVE. NO.	ROBBINSDALE	MN	1	0	0	0	1	0	1	0
				TOTAL ACCOUNTS =	12		4	6	2	0	22		22	0
				TOTAL ACCOUNTS =	12		4	6	2	0	22		22	0

51846 7427

Scroll Master List

This report provides a one line description for each account. The information contained on this report for each account includes Territory, route, account number, call class/frequency, name, address and city.

How to Use

1. Place an "X" beside the *VAP Account Scroll List Detail Report* option and press [ENTER].

Your report request is submitted and will print at the designated print location as soon as possible.

GHCSISRP MASTER ACCOUNT LIST 04/30/93

TERR	RTE	ACCT	CC	NAME	ADDRESS	CITY
212401	000	090230	A04	TOWER TEXACO FOOD	3704 NEW BERN AVE.	RALEIGH
212401	000	096261	C04	SPEEDWAY #257	4100 NEW BERN AVE.	RALEIGH
212401	000	338740	A02	FLY N FOOD STORES	1524 WAKE FOREST RD	RALEIGH
212401	000	451427	B04	HWY, 64 E, GULF	3620 NEW BERN AVE.	RALEIGH
212401	000	500915	B04	LAKE BOONE TRL.66	3600 LAKE BOONE TRL	RALEIGH
212401	000	540123	B02	CIRCLE K #8524	3948 NEW BERN AVENU	RALEIGH
212401	000	572812	B02	PETRO MART #6	4900 NEW BERN AVE.	RALEIGH
212401	000	575416	B04	TEXACO FOOD MART	6801 GLENWOOD AVE.	RALEIGH
212401	000	800225	K02	FOOD LION #54	3615 NEW BERN AVE.	RALEIGH
212401	000	800226	C13	KERR DRUGS #10	3649 NEW BERN AVE,	RALEIGH
212401	000	801296	C04	HWY 64 EAST AMOCO	4000 NEW BERN AVENU	RALEIGH
212401	001	306087	K02	FOOD LION #757	BOULEVARD S/C	RALEIGH
212401	003	338780	B04	ECKERD DRUG 1055	1100-108 RALEIGH BL	RALEIGH
212401	005	301838	K04	WINN DIXIE 862	2116-E NEW BERN AVE	RALEIGH
212401	007	300835	B13	KERR DRUGS 19	2116 NEW BERN AVE,	RALEIGH

ACCTS, IN TERRITORY 212401 - 15

51846 7428

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Activity Summary

This report provides a detail or summary listing of promotional placement activity for a selected time period for accounts selected in the Account Scroll list.

How to Use

1. Place an "X" beside the *Activity Summary Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. A window will appear that prompts you for detail (placement information for each account) or summary (placement information summarized for the accounts selected). Place an "X" beside one option and press [ENTER].
4. Another window will appear that prompts you for the date range. Enter a valid mm/dd/yy beginning and ending date for the report and press [ENTER]. The beginning date cannot be less than the date displayed. This is due to the limited information available at the account level.
5. Your report request is submitted and will print at the designated print location as soon as possible.

Sample reports are on the following pages.

51846 7429

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

$1S1829663?4XX ACTIVITY SUMMARY 06/16/93 11:35:02

FOR QTR ENDING 07/02/93

0326 MINNEAPOLIS DIVISION

	RETAIL	DIRECT	INDIRECT
CALLS MADE	3883	61	170

DISPLAYS/COUPONS/
PREMIUMS

	DISPLAY BEG DT	DISPLAY END DT	DIVISION GOALS	EMP GOALS	FLD	FLD	FLD	TOTAL FLD	% EMP GOALS	EMP DIFF	% DIV GOALS	DIVISION DIFF
WIN SP FB	05/17/93	07/30/93	0	0	89	0	7	96	0	96	0	96
WI $1/2PK CPN	04/05/93	12/31/93	0	0	1748	64	6953	8765	0	8765	0	8765
WI $1.50/3PK CP	04/05/93	12/31/93	0	0	77	0	75	152	0	152	0	152
WI $3 CTN CPN	04/05/93	12/31/93	0	11300	919	68	3189	4176	37	-7124	0	4176
WI $4 CTN CPN	04/05/93	12/31/93	0	0	200	0	0	200	0	200	0	200
W $7/2 CTN CPN	04/05/93	12/31/93	0	2000	8	0	242	250	13	-1750	0	250
W $4 VPR PM OPPO	01/01/93	07/02/93	0	0	0	375	0	375	0	375	0	375
WI .50/PK CPN	04/05/93	12/31/93	0	0	181	20	1121	1302	0	1302	0	1302
WI .50/PK VPR	04/05/93	12/31/93	0	0	3157	0	0	3157	0	3157	0	3157
WIN PACK DISPLAY	01/01/93	01/30/94	0	0	263	0	57	320	0	320	0	320
WIN CTN DISPLAY	01/01/93	01/30/94	0	0	39	0	31	70	0	70	0	70
WIN PREM PACK	01/01/93	01/30/94	9400	9400	1470	80	1400	2950	34	-5650	34	-5650
WIN BXGXF CTN	01/01/93	01/30/94	3840	3840	0	0	260	260	7	-3580	7	-3580
WIN BXGXF PACK	01/01/93	01/30/94	102480	102480	17195	0	1480	18675	18	-84005	18	84005
WI PK .50 BUYDWN	01/01/93	01/30/94	0	0	10807	0	1800	12607	0	12607	0	12607
WI CT .50 BUYDWN	02/22/93	12/31/93	0	0	6522	0	144	6666	0	6666	0	6666
WIN SP 40PK/DB	05/17/93	07/30/93	0	0	277	0	0	277	0	277	0	277
WI .40/1PK VPR	05/03/93	12/31/93	0	0	640	0	0	640	0	640	0	640
WI $5 CTN CPN	05/03/93	12/31/93	0	0	0	10	0	10	0	10	0	10
SA $3 CTN CPN	04/05/93	12/31/93	0	8600	726	514	5205	6445	75	-2155	0	6445
SA $4 CTN CPN	04/05/93	12/31/93	0	0	129	0	0	129	0	129	0	129
SA $1/2PK CPN	04/05/93	12/31/93	0	4000	747	903	4138	5548	139	1548	0	5548
SA .50/1PK CPN	04/05/93	12/31/93	14000	14000	3257	637	5104	8998	64	-5002	64	-5002
SA .50/1PK VPR	04/05/93	12/31/93	0	0	2885	0	0	2885	0	2885	0	2885
SA 10 PKT $1/2PK	06/05/93	07/02/93	0	0	0	0	859	859	0	859	0	859
SAL CTN DISPLAY	01/01/93	01/30/94	0	0	1	0	4	5	0	5	0	5
SAL PACK DISPLAY	01/01/93	01/30/94	0	0	17	0	0	17	0	17	0	17
SAL PREM PACK	01/01/93	01/30/94	5580	5580	0	0	40	40	1	-5540	1	-5540
SAL BXGXF PACK	01/01/93	01/30/94	0	0	80	0	0	80	0	80	0	80
SA PK .50 BUYDWN	01/01/93	01/30/94	0	0	1223	0	0	1223	0	1223	0	1223
SA CT .50 BUYDWN	02/22/93	12/31/93	0	0	820	0	0	820	0	820	0	820
SA $1.50/3PK CP	04/05/93	12/31/93	0	0	0	31	22	53	0	53	0	53
SA .40/1PK VPR	05/03/93	12/31/93	0	0	80	0	0	80	0	80	0	80
C $1.50/3PK CPN	01/01/93	07/02/93	8400	14400	592	0	3128	3720	26	-10680	44	-4680
CA CTN DPLY-JUNE	05/17/93	07/30/93	0	0	16	0	0	16	0	16	0	16
C $3 CTN CPN	04/05/93	12/31/93	0	0	103	0	0	103	0	103	0	103
CA $1/2 PLS CPN	04/05/93	12/31/93	0	0	146	64	1076	1286	0	1286	0	1286
CAM CTN DISPLAY	01/01/93	12/31/93	0	0	5	0	12	17	0	17	0	17
CAM PACK DISPLAY	01/01/93	12/31/93	0	0	805	91	111	1007	0	1007	0	1007
CAM PREM PACK	01/01/93	01/30/94	57840	57840	3795	20	2458	6273	11	-51567	11	-51567
CAM BXGXF PACK	01/01/93	01/30/94	0	0	65525	2540	5340	73405	0	73405	0	73405
CAM BXGXF CTN	01/01/93	01/30/94	0	0	45	0	0	45	0	45	0	45
CA PK .50 BUYDWN	02/24/93	12/31/93	0	0	16049	0	0	16049	0	16049	0	16049
CA CT .50 BUYDWN	02/22/93	12/31/93	0	0	1153	0	4800	5953	0	5953	0	5953

****** - GOAL PERCENTAGE GREATER THAN 999,999

51846 7430

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

6181828763266XX CALL COUNT REPORT 08/18/93 13:31:19

FOR QTR ENDING 07/02/93

DIVISION	EMPLOYEE	CALLS MADE RETAIL	CALLS MADE DIRECT	CALLS MADE INDIRECT
6326 MINNEAPOLIS DIVISION	001000 NAME NOT FOUND 1	0	0	0
	065801 ANDERSON,-THEODORE	345	11	20
	071456 EUGENSDON,-HAROLD	250	8	8
	073234 ADAMINO,-JOSEPH	313	12	18
	076335 LORD,-JAY	276	9	14
	077478 HIRSHBERGER,-MACE	132	2	1
	077488 OMAN,-WADE	324	13	21
	077518 FARNOM,-ART	213	3	5
	077946 ONISEIK,-SALLY	273	4	14
	078033 ENGEL,-MICHAEL	427	0	45
	078079 PELPERRY,-MATTHEW	391	0	1
	827634 CLELAND,-TIMOTHY	371	0	0
	828381 FLECK,-JON	328	0	12
	828802 LOWE,-ROGER	0	0	0
	830933 FRANK,-KRISTINA	350	1	11
	6326 MINNEAPOLIS DIVISION TOTALS	3083	61	170

51846 7431

The report on the previous page was generated by selection the *Call Count* option of the Activity Summary selection.

VAP Account Scroll List Summary

This report provides a worksheet summarized by VAP wholesaler to be used in analyzing the PP1, PP2, PP3 and VAP Override quantities.

How to Use

1. Place an "X" beside the *Reporting Formatting* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

51846 7432

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

GHC735BM VAP ACCOUNT SCROLL LIST SUMMARY REPORT 07/28/93

WHOLESALER NUMBER	WHOLESALER NAME	NUMBER OF ACCOUNTS	PP#1	PP#2	PP#3	EXTRA SKU'S	PP TOTAL	VAP ALLOC	DIV ALLOC
000000	UNKNOWN	106	3	0	3	0	12	12	0
101500	CENTRAL CAROLINA GRO	5	0	0	0	0	0	0	0
144480	J T DAVENPORT & SONS	11	0	0	2	0	6	6	0
250865	NCC L.P.	1	0	0	1	0	3	3	0
376430	MCLANE SOUTHEAST	3	0	0	0	0	0	0	0
417720	J. G. MESSICK & SONS	2	0	0	0	0	0	0	0
492523	ELI WITT #934	1	0	0	0	0	0	0	0
496828	THOMAS AND HOWARD CO	2	0	0	0	0	0	0	0
555201	COASTAL W'SALE, INC.	3	0	0	0	0	0	0	0
605460	SOUTHCO DISTRIBUTING	4	0	0	1	0	3	3	0
920209	K & M WHOLESALE CO.	4	0	0	0	0	0	0	0
	TOTAL	142	3	0	7	0	24	24	0

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Account Recap

This report provides a summary recap of payments made to the accounts selected in the Account Scroll List.

How to Use

1. Place an "X" beside the *Reporting Formatting* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. This screen allows you to select the time period for the recap of payments. Enter valid to/from dates in mm/yy format and press [ENTER].
4. Your report request is submitted and will print at the designated print location as soon as possible.

GHC79405 ACCOUNT RECAP 13:34

FROM-TO: 93/02-93/03

	MONTH		
	93/02	93/03	TOTAL
ITEM			
COUPON PAYMENTS	1785.13	.	1785.13
TEMPORARY PAYMENTS	.	829.00	829.00
***** RECAP SUMMARY TOTAL ****	1785.13	829.00	2614.13

51846 7434

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Brand Distribution Report

This report displays by brand style, the percentage of stores with/without distribution, the number of stores with/without distribution, percent with entry availability, and the percent with exit availability. (The account scroll list selected is used to determine the distribution figures.)

How to Use

1. Place an "X" beside the *Brand Distribution Report* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

51800487 BRAND DISTRIBUTION REPORT 04/20/93 13:34:40
FROM MASTER LIST SELECTION
SAMPLE REPORT

	% WITH DIST	STORES WITH DIST	% W/O DIST	STORES W/O DIST	% ENTRY AVAIL	% EXIT AVAIL
BEST VALUE	13.3	2	86.7	13	6.7	6.7
CAMEL F 85 SP	100.0	15	0.0	0	100.0	100.0
CAMEL LTS F 85 HP	86.7	13	13.3	2	80.0	80.0
CAMEL LTS F 85 SP	100.0	15	0.0	0	100.0	100.0
CAMEL NF 70	100.0	15	0.0	0	100.0	100.0
CAMEL WIDES F79 HP	80.0	12	20.0	3	73.3	73.3
CAMEL SPC LF100 HP	80.0	12	20.0	3	66.7	80.0
CAMEL SPC L F83 HP	80.0	12	20.0	3	66.7	80.0
CAMEL SPC L F85 SP	80.0	12	20.0	3	66.7	80.0
CAMEL WIDES LF79HP	80.0	12	20.0	3	73.3	73.3
DORAL F 100	100.0	15	0.0	0	100.0	100.0
DORAL M 85	100.0	15	0.0	0	93.3	93.3
DORAL M 100	86.7	13	13.3	2	80.0	80.0
DORAL F 85 SP	100.0	15	0.0	0	100.0	100.0
DORAL LTS F 100	100.0	15	0.0	0	100.0	100.0

51846 7435

Copyright © R.J. Reynolds Tobacco Company 1993

Account Labels

This option will generate mailing labels for accounts selected in the Account Scroll List. These labels will be printed in Winston-Salem and mailed to your location.

How to Use

1. Place an "X" beside the *Reporting Formatting* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER]. The printer destination will be automatically changed for label printing in W-S.
3. Your report request is submitted and will print at the designated print location as soon as possible.

```
540123                      096261                   338748
CIRCLE K #8524              SPEEDWAY #257            FLY N FOOD STORES
3948 NEW BERN AVENUE        4100 NEW BERN AVE.       1524 WAKE FOREST RD
RALEIGH, NC 27602           RALEIGH, NC 27604        RALEIGH, NC 27604
500915                      090238                   306007
LAKE BOONE TRL.66           TOWER TEXACO FOOD        FOOD LION #757
3600 LAKE BOONE TRL.        3704 NEW BERN AVE.       BOULEVARD S/C
RALEIGH, NC 27607           RALEIGH, NC 27610        1100-122 RALEIGH BLV
                                                     RALEIGH, NC 27610
338780                      301838                   300835
ECKERD DRUG 1055            WINN DIXIE #62           KERR DRUGS 19
1100-108 RALEIGH BLV        2116-E NEW BERN AVE.     2116 NEW BERN AVE.
RALEIGH, NC 27610           LONGVIEW GARDEN S/C      RALEIGH, NC 27610
                            RALEIGH, NC 27610
451427                      572912                   800225
HWY. 64 E. GULF             PETRO MART #6            FOOD LION #54
3820 NEW BERN AVE.          4900 NEW BERN AVE.       3615 NEW BERN AVE.
RALEIGH, NC 27610           RALEIGH, NC 27610        RALEIGH, NC 27610
800226                      801296                   575416
KERR DRUGS #10              HWY 64 EAST AMOCO        TEXACO FOOD MART
```

51846 7436

Copyright © R.J. Reynolds Tobacco Company 1993
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Account Specific Profile

This report details the Top 25 account information for each account, the promotional opportunities available based on the Top 25 information, smoker profile information, as well as all information contained in the standard master list report. Each account contains one page of information.

How to Use

1. Place an "X" beside the *Reporting Formatting* option and press [ENTER].
2. Enter a valid printer destination, the number of copies needed, and a brief report title. Press [ENTER].
3. Your report request is submitted and will print at the designated print location as soon as possible.

51846 7437

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

GHC051BM MTD PAGE: 1   ACCOUNT SPECIFIC PROFILE - ACCOUNT: 289197   06/16/93 11:20:47

TERR/ROUTE/CLASS/FREQ:
632601 025 A02 / / / /

ACCOUNT NAME: WEEKLY VOL: 190 TYPE/SEGMENT: B CH ACCOUNT GROUPS
HOLIDAY EXPRESS #243 CHAIN ID/NAME
ADDRESS: 0504 HOLIDAY EXPRESS CAS
12024 CHAMPLIN DRIVE TIR/SS: CORP - Y16
TELEPHONE: 612-323-9117
CITY: CHAMPLIN MONTHLY CALL COUNT: MAR APR MAY JUN
ZIP : 55316 1 1 1 1
LAST MAINT DATE: 04/03/92 BY: SS

PRIMARY WHOLESALER
718000/WORLD WIDE INC.WHSE
SECONDARY WHOLESALER
428480/MINTER/A WEISMAN IN
VAP WHOLESALER
718000/WORLD WIDE INC.WHSE

PROMOTIONAL INDICATORS

LOCAL

NATIONAL

OVERDEV SAVINGS	1
WIN EXGEF	20
WIN PKG PREMIUM	20
WIN PKG COUPON	40
CAM EXGEF	40
CAM PKG PREMIUM	40
CAM PKG COUPON	60
MARLBORO OUTLET	1
VALU ADD ACCT	1
P.P. PACK #3	1
COUPON ACCOUNT	1

BRAND ANALYSIS

TOP 25 BRAND VOLUMES

RANK	BRAND STYLE	VOL
1	MAR LF85BX	21
2	MAR F85BX	17
3	MAR F100BX	9
4	MAR LF100B	9
5	* CAM L 85BP	6
6	MAR LF85SP	5
7	MAR F85SP	4
8	MAR MDF85B	4
9	MER UF85B	4
10	* CAM L 85SP	3
11	MAR LF100S	3
12	MER F100	3
13	* SAL L 85	3
14	* CAM F 85BP	2
15	[illegible]	2
16	* MAG F83BX	2
17	* MAG F85SP	2
18	MER F85BX	2
19	MER F85SP	1
20	MER UF85S	2
21	MER LM085P	1
22	* VAN F 85	2
23	* WIN F 85BX	1
24	* WIN L 85BX	2
25	* WIN L 85SP	2

TOP 25 CTNS/WK 115

% TOTAL VOLUME 61%

PROMOTIONAL OPPORTUNITY ANALYSIS

BRAND OPPORTUNITY	RJR BRAND VOL(*)	COMP OPPORT VOLUME
PRIORITY		
WINSTON	6	83
SALEM	3	8
CAMEL	11	83
OPPORTUNISTIC		
VANTAGE	2	19
NOW	0	11
MORE	0	14
SAVINGS		
DORAL	0	0
STERLING	0	0
MAGNA	0	0

BRAND OPPORTUNITY RANK

WINSTON	2
CAMEL	1
VANTAGE	3

STYLE INDICATORS

FLAV:	33%	FF
	62%	LTS
	5%	ULT
	6%	MEN
	94%	NON MEN
LGTH:	0%	70
	79%	85
	21%	100/120
PACK:	30%	SFT
	70%	BOX

MERCHANDISING

CONTRACTS

* - expired contract

EXTRA VALUESVD		1
PREF FA CEHAL3		1
PREF FREE	ABC	1
SACON	A	1
TCM	C	1

FIXTURES

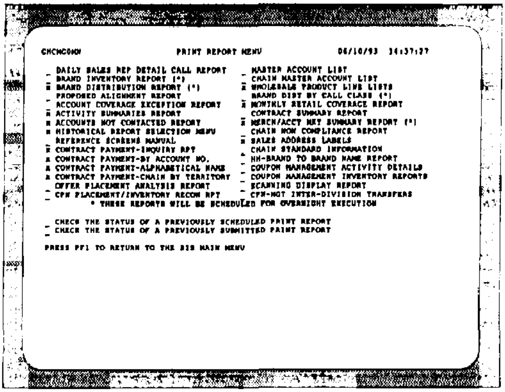
OTHER RJR CTM	1
RJR PROMO PLACEM	1
RJR CPM	3
CLAP VALHAUS	1
LOW PROFILE	1
OTHER COMP PCD	1
LD PKG FIX SM	3
CLOCK/LTD SIGN	1

51846 7438

Print Reports

Another method exists for requesting certain reports without entering the main master list selection screens. This is done by directly accessing the Print Report from the SIS Menu.

1. At the Application Selection Menu, type x by PRINT REPORT and press [ENTER].



Print Report Menu

- The reports above marked with an "X" are the most commonly selected documents.
- Following is a brief description of each of these commonly used selections.

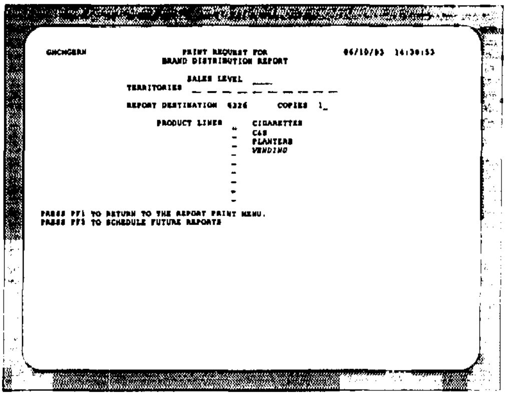
51846 7439

Copyright © R.J. Reynolds Tobacco Company 1993

Issued: 8/93

Brand Distribution Report

This is used by management and reps to determine the availability of RJR brands in retail accounts.



- Enter the sales level desired; a Division and up to 10 Territories may be selected. Simply reenter mode if more than 10 territories are present.
- Select proper report destination.
- Select appropriate product line (i.e., cigarettes)
- Press [ENTER] to submit report. Press [PF5] to schedule report for future date.

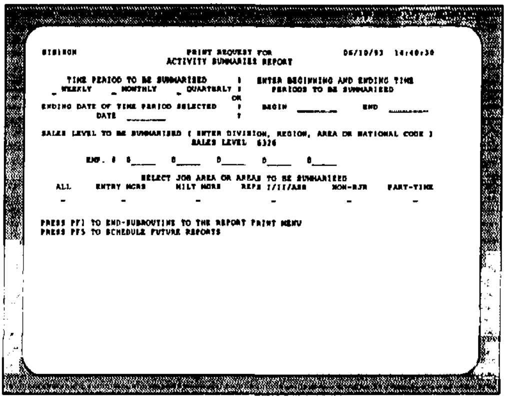
51846 7440

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Activities Summaries Report

This is utilized by management and sales reps to review progress towards goals, promotion, placements and other pertinent activity indicating work accomplished. A report indicating the number of calls made by reps can also be produced from this screen.



Two options are available:

1. Select time period to be summarized (weekly, monthly, quarterly) and ending date of time period selected. Then indicate for whom the summary is to be printed (i.e., employee number, all employees, reps, etc.)

   When to utilize: For ongoing monthly reports, when activity can be pulled up by preset company time frames.

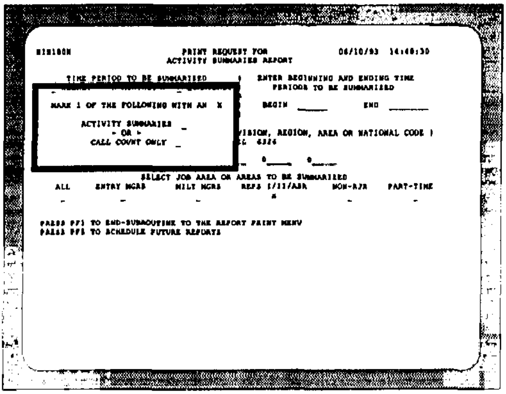
2. Enter beginning and ending dates for periods to be summarized. Again indicate for who, the summary is to be printed.

   When to utilize: When request comes in for a time period not found on the screen.

51846 7441

Copyright © R.J. Reynolds Tobacco Company 1993

Select desired report content (one allowed) and press [ENTER].



Select level of report produced. Press [ENTER].

51846 7442

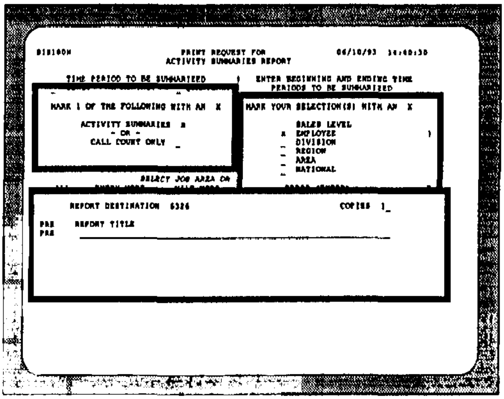
 Copyright © R.J. Reynolds Tobacco Company 1993

Entering...

- "employee" will produce individual reports only
- "division" will produce Division totals
- "region" will produce Region totals

More than one option is allowed.

Indicate destination, number of copies and title, if needed.



Press [ENTER] to submit the report.

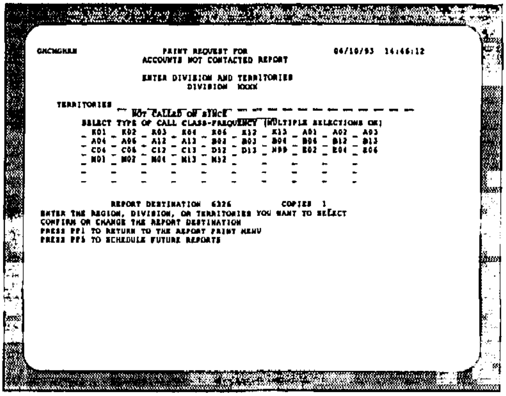
51846 7443

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Accounts Not Contacted Report

Allows management and reps to determine, by call classification and Territory, which accounts have not been contacted since a certain date.



```
GNCMGHAN            PRINT REQUEST FOR              04/10/93  14:46:12
               ACCOUNTS NOT CONTACTED REPORT

               ENTER DIVISION AND TERRITORIES
                       DIVISION  XXXX

  TERRITORIES _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _
        NOT CALLED ON SINCE ______
     SELECT TYPE OF CALL CLASS-FREQUENCY (MULTIPLE SELECTIONS OK)
     _ K01 _ K02 _ K03 _ K04 _ K06 _ K12 _ K13 _ A01 _ A02 _ A03
     _ A04 _ A06 _ A12 _ A13 _ B02 _ B03 _ B04 _ B06 _ B12 _ B13
     _ C04 _ C06 _ C12 _ C13 _ D12 _ D13 _ N99 _ E02 _ E04 _ E06
     _ M01 _ M02 _ M04 _ M13 _ M52 _
     _     _     _     _     _     _     _     _     _     _
     _     _     _     _     _     _     _     _     _     _
     _     _     _     _     _     _     _     _     _     _

          REPORT DESTINATION  6326          COPIES  1
ENTER THE REGION, DIVISION, OR TERRITORIES YOU WANT TO SELECT
CONFIRM OR CHANGE THE REPORT DESTINATION
PRESS PF1 TO RETURN TO THE REPORT PRINT MENU
PRESS PF5 TO SCHEDULE FUTURE REPORTS
```

- Enter Division and Territories necessary.
- Indicate beginning date of period to be scanned.
- Place an "X" next to each call class desired. (Multiple selections allowed.)
- Verify destination and press [ENTER].

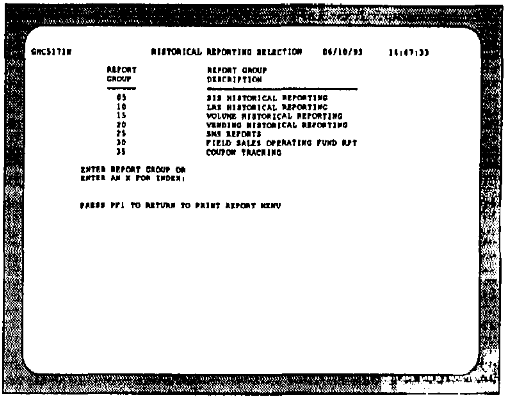
51846 7444

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Historical Report Selection Menu

After a certain length of time, reports cannot be accessed unless through the historical logs in the system.



To select a category, type in report group number and press [ENTER]. If you are unsure as to proper category or report title, type "X" to view an index. The index is included below.

010	MONTHLY VERIFICATION REPORT	FIELD SALES OPERATING FUND RAT
110	DIVISION ACTIVITY	COUPON TRACKING
115	EMPLOYEE ACTIVITY	COUPON TRACKING
120	TOP 25/BRAND OPPORTUNITY REPORT	SIS HISTORICAL REPORTING
121	PRELIMINARY PAY REGISTER DETAIL	SIS HISTORICAL REPORTING
122	PRELIMINARY PAY REGISTER TOTALS	SIS HISTORICAL REPORTING
123	WEEKLY FINAL PAY REGISTER DETAIL	SIS HISTORICAL REPORTING
125	QUARTERLY FINAL PAY REGISTER DETAIL	SIS HISTORICAL REPORTING
126	QUARTERLY FINAL PAY REGISTER TOTALS	SIS HISTORICAL REPORTING
127	SIS DIRECTORY OF CHAIN ACCOUNT	SIS HISTORICAL REPORTING
130	ELECTRONIC SECURITY DEDUCTION REPT.	SIS HISTORICAL REPORTING
132	ACCOUNTS PAID, NO CALL MADE REPORT	SIS HISTORICAL REPORTING
134	CPR 'NO-PAY' ACCOUNT LIABILITY RPT	SIS HISTORICAL REPORTING
135	DISTR. ASSIST PAYMENT SUMMARY RPT.	SIS HISTORICAL REPORTING
137	LIST OF ACCOUNTS WITH MISSING TAXID	SIS HISTORICAL REPORTING
141	MONTHLY RETAIL ACCOUNT COVERAGE RP	SIS HISTORICAL REPORTING
151	CUSTOMER STATEMENTS	VOLUME HISTORICAL REPORTING
154	WEEKLY REPORT OF DOMESTIC SALES	VOLUME HISTORICAL REPORTING
155	WEEKLY SALES RESULTS	VOLUME HISTORICAL REPORTING
156	MONTHLY REPORT OF DOMESTIC SALES	VOLUME HISTORICAL REPORTING
159	RETURNED GOODS MONTHLY REPORT	VOLUME HISTORICAL REPORTING
162	WINNERS PROGRAM INTERIM STATEMENTS	VOLUME HISTORICAL REPORTING
163	WINNERS PROGRAM PAYMENT STATEMENTS	VOLUME HISTORICAL REPORTING
164	DIRECT CUSTOMER BUSINESS REVIEW	VOLUME HISTORICAL REPORTING
170	VENDING QTRLY FINAL PAY REGISTER	VENDING HISTORICAL REPORTING
180	VENDING PLACEMENT PAYMENT REPORT	VENDING HISTORICAL REPORTING
200	FIELD SALES EMP/DEPT WEEKLY TOTALS	LRS HISTORICAL REPORTING

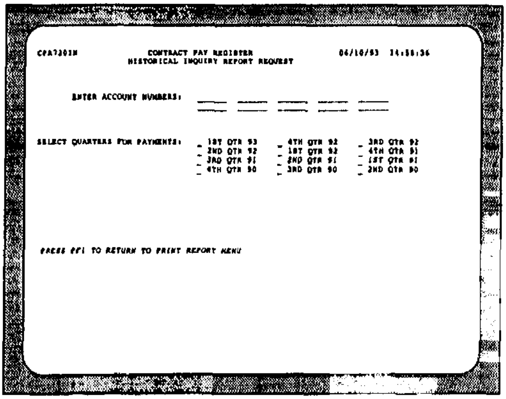
51846 7445

Copyright © R.J. Reynolds Tobacco Company 1993

503	BRAND DIST REPORT- CIGARETTES	SIS HISTORICAL REPORTING
509	REPRINT DAILY ACTIVITY REPORT	SIS HISTORICAL REPORTING
511	REPRINT WEEKLY NON COMPLIANCE REPT	SIS HISTORICAL REPORTING
512	REPRINT WEEKLY TPS PC PAYMENT REPT	SIS HISTORICAL REPORTING
540	MONTHLY NON-COMPLIANCE REPORT	SIS HISTORICAL REPORTING
620	REPRINT INVENTORY MGT ITEM CATALOG	SMS REPORTS
670	REPRINT SMS SHIPPING MEMOS	SMS REPORTS
700	REPRINT VAP ALLOCATION ADJUSTMENT	SMS REPORTS
806	QUARTERLY WORKPLAN PROMOTIONS	SIS HISTORICAL REPORTING

Contract Payment by Account Number

Used by management to determine contracts in effect for specific accounts during specific time frames. Also used to inquire about lost checks.



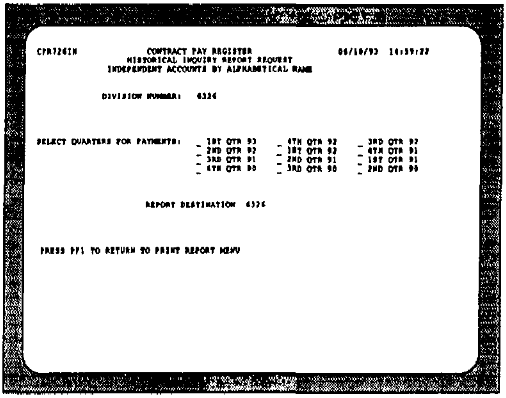
- Enter account numbers.
- Type "X" for each quarter desired.

51840 7446

 Copyright © R.J. Reynolds Tobacco Company 1993

Contract Payment - Alphabetical

Utilized by management to organize contracts in independent calls alphabetically by quarter.



- Select quarters for payment.
- *Verify destination and press [ENTER].*

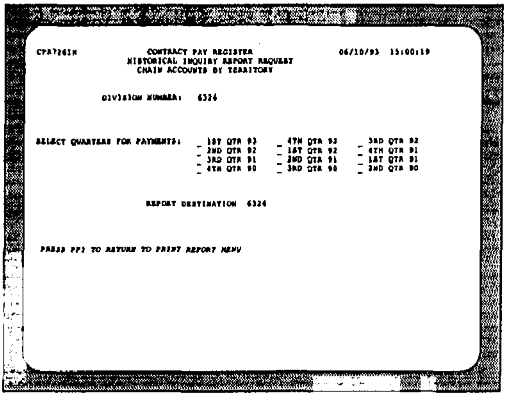
51846 7447

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Contract Payment by Chain Accounts

Used by management to review contacts in effect in chain calls for certain time periods.



- Select quarters.
- Verify destination and press [ENTER].

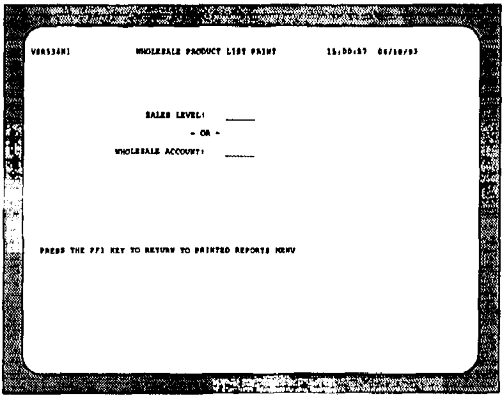
51840 7448

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Warehouse Product List

Used by reps/management to determine order numbers for RJR brands.



Enter sales level for all accounts at that level or wholesale number for specific wholesaler.

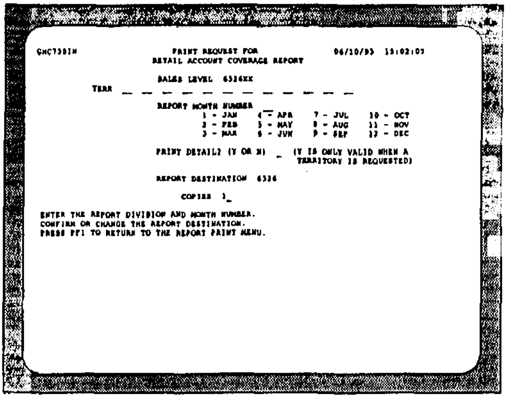
51846 7449

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Retail Account Coverage

This is the main report utilized by reps/management which indicates the percentage of calls entered during the monthly reporting periods.



To print Division/Region totals:

- Type Division/Region number followed by x's at the sales level prompt (i.e., 6326XX, 63XXXX, etc.)
- Type proper report month number in blank.
- Verify destination and press [ENTER].

To print Territory totals:

- Type Division number, followed by $$ (i.e., 6326$$).
- Type desired Territory numbers in TERR blanks.
- Type proper report month number.
- If a list of individual accounts not contacted in addition to the "totals" sheet is needed, type "Y" at Print Detail?. Otherwise, type "N".
- Verify the destination and press [ENTER].

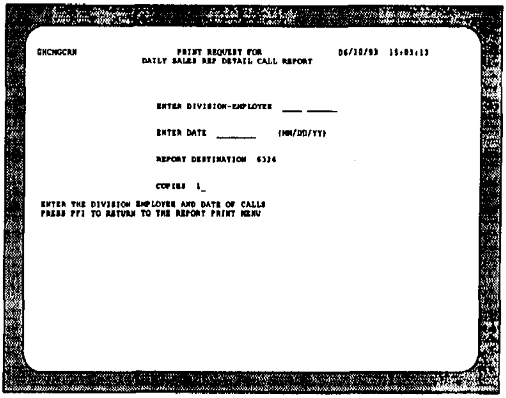
51846 7450

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Daily Sales Rep

Utilized by management to assist with Training Analysis and to review rep activities.



- Enter Division and employee number
- Enter date desired
- Verify destination and press [ENTER].

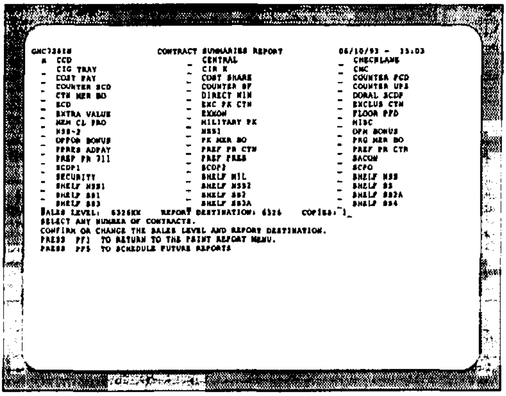
51846 7451

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Contract Summaries Report

Provides management with totals regarding selected contract types and the number of each of selected level.



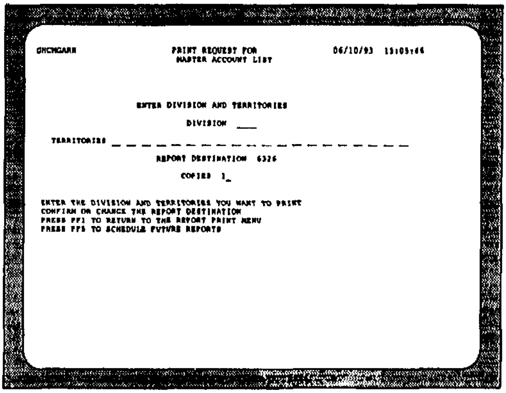
- *Select any number of contracts.*
- Select sales level. Can be either Region, Division, or Territory provided proper numbers are followed by x's (i.e., 63XXXX, 6326XX, 632610).
- Verify destination and press [ENTER].

51846 7452

 Copyright © R.J. Reynolds Tobacco Company 1993

Master Account List

Used by reps in the field to review pertinent account information.



Enter:

1. Division number or
2. SpecificTerritories

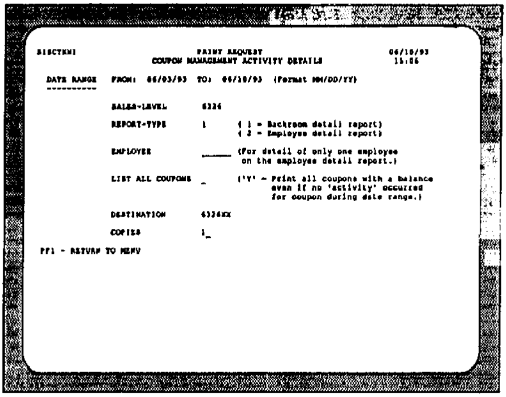
   Verify destination (remember W-S printing options when size of request is large) and press [ENTER].

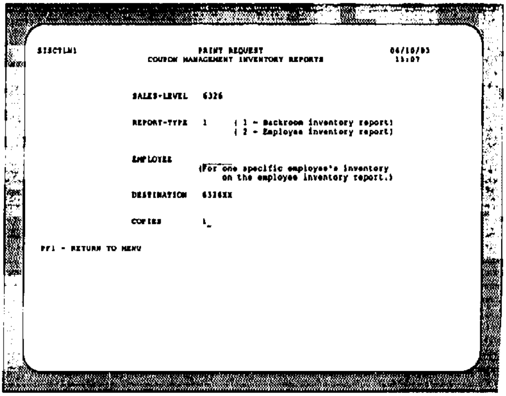
51846 7453

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

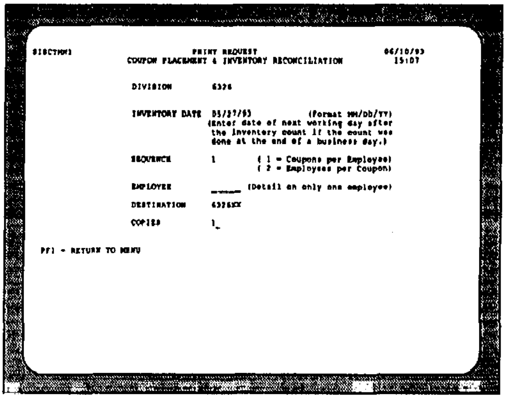
Coupon Management





51846 7454

 Copyright © R.J. Reynolds Tobacco Company 1993



SIBCTMM1 PRINT REQUEST 06/10/93
COUPON PLACEMENT & INVENTORY RECONCILIATION 15:07

DIVISION 6326

INVENTORY DATE 05/27/93 (Format MM/DD/YY)
(Enter date of next working day after the inventory count if the count was done at the end of a business day.)

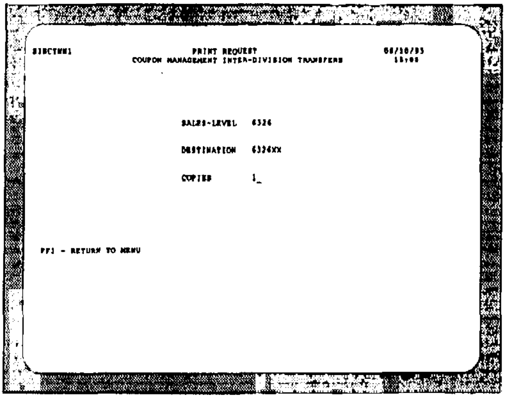
SEQUENCE 1 (1 = Coupons per Employee)
(2 = Employees per Coupon)

EMPLOYEE ______ (Detail on only one employee)

DESTINATION 6326XX

COPIES 1_

PF1 - RETURN TO MENU



SIBCTMM1 PRINT REQUEST 06/10/93
COUPON MANAGEMENT INTER-DIVISION TRANSFERS 15:08

SALES-LEVEL 6326

DESTINATION 6326XX

COPIES 1_

PF1 - RETURN TO MENU

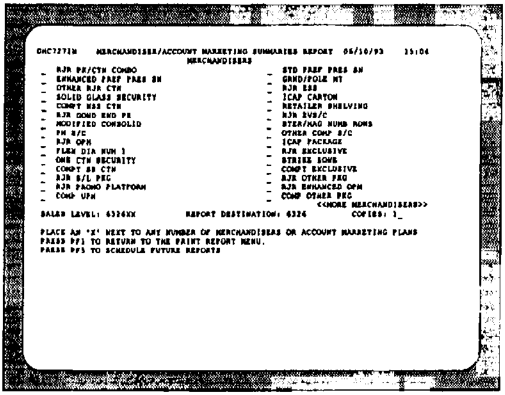
51846 7455

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Merch/Acct Market

Indicates to reps/management the number of merch/account marketing items found in a given Territory or Division.



- Select any number of entries.
- Select desired sales level.
- Verify destination and press [ENTER].
- *Note:* [PF5] - Schedule future reports function is available here.

Address Labels

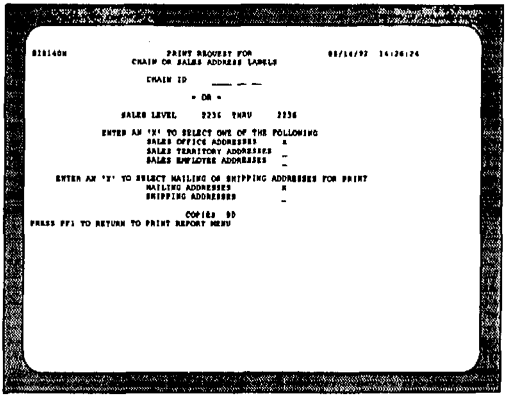
To order address labels:

1. At the Print Report Menu, type x by SALES ADDRESS LABELS and press [ENTER]..

51846 7456

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



Print Request for Chain or Sales Address Labels

2. At the Print Request for Chain or Sales Address Labels screen, select Chain ID or Sales Level.

3. Select type of address label needed.

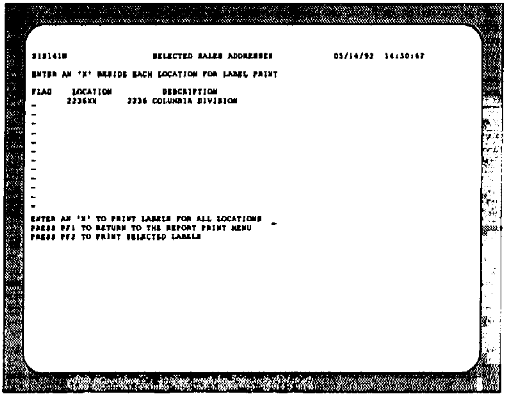
4. Select mailing or shipping addresses.

5. Select number of copies (in increments of 15) and press [ENTER].

51846 7457

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



Selected Sales Addresses

6. At the Selected Sales Addresses menu, follow the prompts at the bottom of the screen. If you press [PF2], a series of *** in this area will confirm your selection.

51846 7458

 Copyright © R.J. Reynolds Tobacco Company 1993

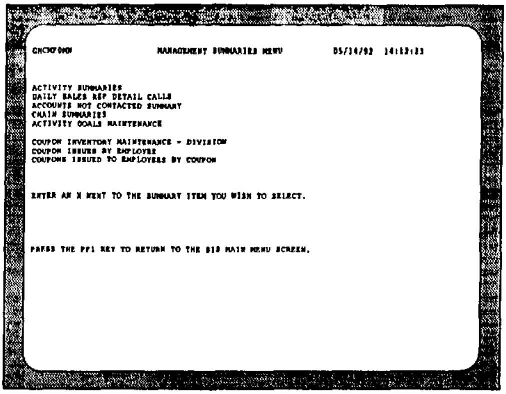
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Management Summaries

This selection from the SIS main menu allows the user to view several report formats on-line. Utilize this function when a paper copy is not needed or when only a portion is needed.

To access the Management Summaries Menu:

1. At the Application Selection Menu, type x by MANAGEMENT SUMMARIES and press [ENTER].



Management Summaries Menu

The SC will only be responsible for understanding the following. The other selections are covered by other administrative personnel. Follow the prompts to see online information regarding the desired subject matter:

- Activity Summaries
- Daily Sales Rep Detail Calls
- Accounts Not Contacted Summary
- Chain Summary

51846 7459

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3 REQUESTING REPORTS

51846 7460

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7461

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7101 ENTRY

Summary

This section provides procedures for updating information appearing on the Master List. It also familiarizes the new System Coordinator with terminology and various types of contracts.

Preliminary Notes

Form 7101 is the form currently in use at RJRT for standard accounts. Due to recent IRS reporting requirements, the information in the Taxpayer Identification Information section *must* be completed and signed by all new accounts and by any existing account experiencing a change in status.

Following entry into Sales Information System (SIS), 7101s that support current tax information must now be retained in a file titled *7101 Tax Support* at the Operations Unit for a period of 1 year plus current. A new 7101 Tax Support file should be established each year and proper procedures followed.

In addition, Form 7101s that support any additions, changes, or deletions of merchandising contracts should be retained in a support file for period of 1 year plus current. A *7101 Merchandising Support* file should be established to retain these forms.

IRS Requirements

Due to a change in IRS regulations, RJRT must ensure that accurate and appropriate taxpayer identification information is obtained from customers. Failure to comply will result in RJRT being required to withhold taxes from customer payments or face paying these taxes and/or fines.

Payments that are reported on IRS Form 1099 are contractual payments, vending payments, temporary display payments, value added payments, coupon handling. Virtually any payments where the account has performed a service for RJR are reportable on IRS Form 1099.

The IRS requires RJRT to obtain a taxpayer's name and taxpayer ID number based on type of entity. To comply with IRS regulations, the Standard Account Inquiry Screen has been modified to include the tax ID name in addition to tax ID type and number.

For *all* accounts, the tax information *must* be entered. Failure to secure and enter this information will result in the account being flagged in a NO-PAY status. NO contractual payments can be processed via the pay register or temporary payments via the Division PC until the NO-PAY status is lifted by Headquarters. The flag will not be lifted until the required tax information is entered, and a print screen showing the corrected tax information is faxed to your Area Finance Manager or Sales Finance. The following details refer to specifics explained in the following pages.

51846 7462

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Standard Account Screen Directions

Description	*Required Action*
1. Corporation	• Enter Y (Yes) if account is incorporated. (No further action is necessary as RJRT is not required to issue 1099s to a corporation.) • Enter E (Exempt) if account certifies it is tax exempt. (No further action is necessary as RJRT is not required to issue Form 1099s to a tax exempt corporation.) • Enter N (No) if account does not meet criteria for A or B. (Continue to 2.)
2. Tax ID Type	• Enter S if account is individual or sole proprietorship. (Account will file tax return as part of owner's Form 1040.) (Continue to 3.) • Enter F if account is a partnership, trust, estate, or similar entity. (Continue to 3.)
3. Tax ID	• If S was entered in 2, this number *must* be the owner's Social Security number. (Continue to 4.) • If F was entered in 2, this number *must* be the partnership, trust, or estate Federal Employer Identification Number (EIN). (Continue to 4.)
4. Tax ID Name	• If S was entered in 2, this *must* be the owner's name as it appears on his/her Social Security card. • If F was entered in 2, this number *must* be the partnership, trust, or estate name as it appears in IRS Form 8501 (i.e., the IRS form that assigned an EIN to this partnership, trust, or estate when the organization was set up).

51846 7463

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7101 ENTRY

Documentation (i.e., Form 7101) supporting current tax information should be retained in accordance with the instruction issued with the revised 7101 form.

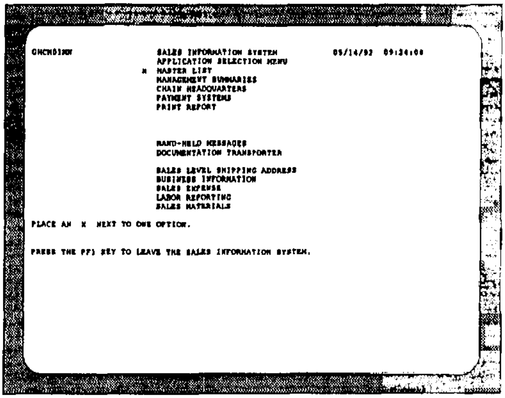
Sales Reps and management will submit 7101s to make changes that can't be made via the handheld computer. This includes:

- Opening new accounts
- Deleting new accounts
- Changing account information
- Changing general information
- Changing contracts

Creating New Account

To enter new account information:

1. Log onto SIS.

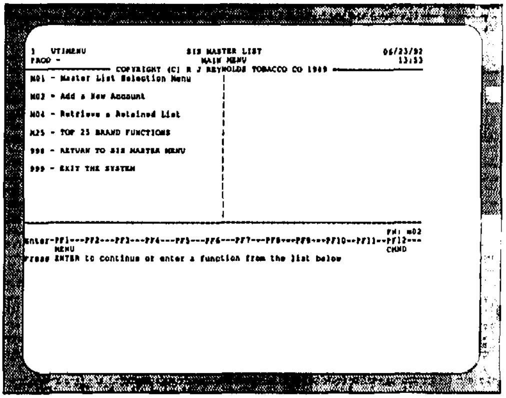


51846 7464

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. At the Application Selection Menu, type x in front of MASTER LIST and press [ENTER].

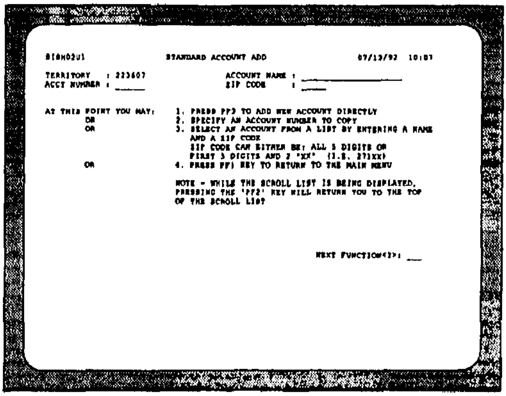


51846 7465

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

3. At the Master List Main Menu at FN: (lower right), type m02 and press [ENTER].



4. At the Standard Account Add (U1) screen at TERRITORY: (upper left), type in Territory number (see example 7101 form) and press [PF3]. Account number will be assigned by computer.

51846 7466

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

(Intentionally left blank)

51846 7467

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

TAX STATUS:

Y CORPORATION (Signature Only)

___ INDIVIDUAL OR PROPRIETOR (Complete A)

☐☐☐ - ☐☐ - ☐☐☐☐
Social Security Number

___ PARTNERSHIP, TRUST OR ESTATE (Complete B)

☐☐ - ☐☐☐☐☐☐☐
Employer Identification Number

___ EXEMPT (EXPLAIN) (Signature Only)

NOTE: All Accounts MUST have a Signature, Title and Date!!

TAX PAYER IDENTIFICATION INFORMATION

S. Jones Store Manager 5/1/92
Corporate Representative Signature & Title Date

(A) For Individuals and Sole Proprietors use Social Security Number and Name.

(Owner's Name as shown on SS Card) Signature & Title Date

(B) For Partnerships, Trusts, Estates and Others use the Employer Name and Identification Number.

(Employer's Name as shown on IRS Form 8501) Signature & Title Date

EXPLAIN

Signature Title Date

Function

A = ADD
E = END
D = DELETE
C = CHANGE

FUNCTION	CONTRACT TYPE	PLAN	UNITS	EFFECTIVE

MERCHANDISERS

PACKAGE	TYPE	NUMBER	CARTON	TYPE	NUMBER

PDI

'OMMENTS/INFORMATION:

51846 7468

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJRT Form 7101 - Rev 3/91
Item No 071018

RJR STANDARD ACCOUNT INFORMATION

NAME: J. Smith

CODE [X] NEW ACCOUNT [ ] CHANGE ACCOUNT [ ] DELETE ACCOUNT DATE: 5-1-92

COUNT (New Accounts will be assigned number by computer)

TERRITORY 223607 ROUTE HAND-HELD NAME Harris Teeter2

ORDER-ENTRY NUMBER

ACCOUNT NAME AND ADDRESS

Example 7101

NAME	Harris Teeter #226
ADDR 1	1730 Cherry Road
ADDR 2	
CITY	Rock Hill
STATE	SC
ACCT. ZIP	29730

MAILING NAME AND ADDRESS
(Enter if different from above)

Name	
ADDR 1	
ADDR 2	
CITY	
STATE	
MAIL ZIP	

ACCOUNT PHONE NUMBER (AREA CODE) 803 279 8000

PRIMARY WHOLESALER 552755 SECONDARY WHOLESALER

VAP WHOLESALER VAP SUPPLIER

TAX JURISDICTION

TYPE R R = RETAIL I = INDIRECT CHECK SPECIAL HANDLING Y/N N

CALL CLASSIFICIATION FREQUENCY N99

SEGMENT SM

RETAIL		INDIRECT
CN = Convenience	OH = Other	CW = Chain Whse.
DG = Drug	RB = Rest/Bar	IN = Institution
DT = Discount	SF = Small Food	MI = Military
GS = Gas Station	SM = Supermarket	TD = Tob. Distr.
IN = Institution	SS = Superstore	VE = Vendor
LQ = Liquor	TB = Tobacco News	WG = Whsle. Groc.
MI = Military	UN = Univ/College	OF-Office

51846 7469

WEEKLY VOLUME

IS THIS ACCOUNT A CHAIN? Y/N Y SIS CHAIN ID NO. (DIVISION OFFICE FILL IN)

(IF YES, CHAIN HEADQUARTERS NAME) Harris Teeter CHAIN DISTRICT/BRANCH

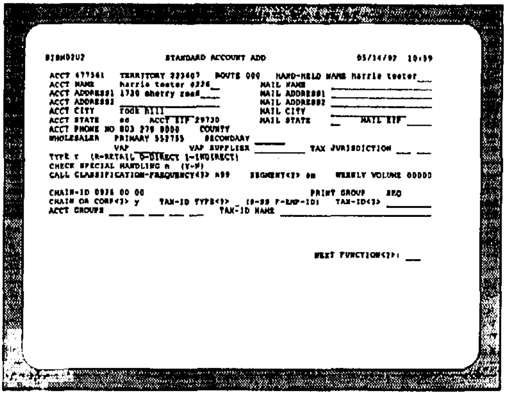
Has account tax status changed?

or

Is this a new account?

If yes to either, complete Taxpayer Identification Information on reverse.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



IMPORTANT: If the tax information (e.g., chain or corp., tax ID type, or tax ID name) is not entered at the time the account is first added, the account will automatically be placed in a NO PAY status.

1. At the Standard Account Add (U2) screen, fill in information from Form 7101 (see example 7101 form) and press [ENTER]. Screen will respond with ACCOUNT HAS BEEN ADDED SUCCESSFULLY to verify that account has been added. In this case, the new account is a Chain store, so the Chain ID number must be added (see section 11).

2. Copy account number onto Form 7101 and send a copy to appropriate Sales Representative.

- *Note:* Form 7101s with new or updated tax information *must* be retained in the 7101 Tax Support file.

Deleting Account

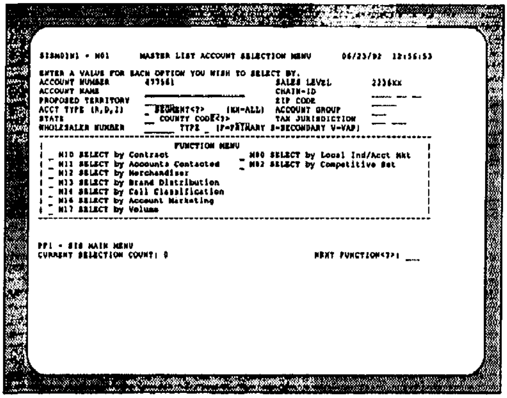
To delete an account:

1. At the Application Selection Menu (page 10-4), type x beside MASTER LIST and press [ENTER].

51846 7470

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



2. At the Master List Account Selection Menu at ACCOUNT NUMBER (upper left), type in the account number (see example 7101 form) and press [ENTER].

51846 7471

 Copyright © R.J. Reynolds Tobacco Company 1993

RJRT Form 7101 - Rev 3/91
Sym No 071018

RJR STANDARD ACCOUNT INFORMATION

NAME: J. Smith
DATE: 6-15-92

CODE [ ] NEW ACCOUNT [ ] CHANGE ACCOUNT [X] DELETE ACCOUNT

ACCOUNT 477561 (New Accounts will be assigned number by computer)

TERRITORY 223607 ROUTE [ ] HAND-HELD NAME [ ]

ORDER-ENTRY NUMBER [ ]

ACCOUNT NAME AND ADDRESS

NAME Harris Teeter #226
ADDR 1
ADDR 2
CITY
STATE ACCT. ZIP

Example 7101

MAILING NAME AND ADDRESS
(Enter if different from above)

Name
ADDR 1
ADDR 2
CITY
STATE MAIL ZIP

ACCOUNT PHONE NUMBER (AREA CODE)

PRIMARY WHOLESALER

SECONDARY WHOLESALER

VAP WHOLESALER

VAP SUPPLIER

TAX JURISDICTION

TYPE [ ] R = RETAIL, I = INDIRECT

CHECK SPECIAL HANDLING Y/N [ ]

CALL CLASSIFICIATION FREQUENCY N 9 9

SEGMENT [ ]

RETAIL		INDIRECT
CN = Convenience	OH = Other	CW = Chain Whse.
DG = Drug	RB = Rest/Bar	IN = Institution
DT = Discount	SF = Small Food	MI = Military
GS = Gas Station	SM = Supermarket	TD = Tob. Distr.
IN = Institution	SS = Superstore	VE = Vendor
LQ = Liquor	TB = Tobacco News	WG = Whsle. Groc.
MI = Military	UN = Univ/College	OF-Office

51846 7472

WEEKLY VOLUME

IS THIS ACCOUNT A CHAIN? Y/N [ ]

SIS CHAIN ID NO. (DIVISION OFFICE FILL IN)

(IF YES, CHAIN HEADQUARTERS NAME)

CHAIN DISTRICT/BRANCH

Has account tax status changed?

or

Is this a new account?

If yes to either, complete Taxpayer Identification Information on reverse .

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

TAX STATUS:

___ CORPORATION (Signature Only)

___ INDIVIDUAL OR PROPRIETOR (Complete A)

☐☐☐-☐☐-☐☐☐☐
Social Security Number

___ PARTNERSHIP, TRUST OR ESTATE (Complete B)

☐☐-☐☐☐☐☐☐☐
Employer Identification Number

___ EXEMPT (EXPLAIN) (Signature Only)

NOTE: All Accounts MUST have a Signature, Title and Date!!

TAX PAYER IDENTIFICATION INFORMATION

Corporate Representative ___ Signature & Title ___ Date ___

(A) For Individuals and Sole Proprietors use Social Security Number and Name.

(Owner's Name as shown on SS Card) ___ Signature & Title ___ Date ___

(B) For Partnerships, Trusts, Estates and Others use the Employer Name and Identification Number.

(Employer's Name as shown on IRS Form 8501) ___ Signature & Title ___ Date ___

EXPLAIN ___

Signature ___ Title ___ Date ___

Function

A = ADD
E = END
D = DELETE
C = CHANGE

FUNCTION	CONTRACT TYPE	PLAN	UNITS	EFFECTIVE

MERCHANDISERS

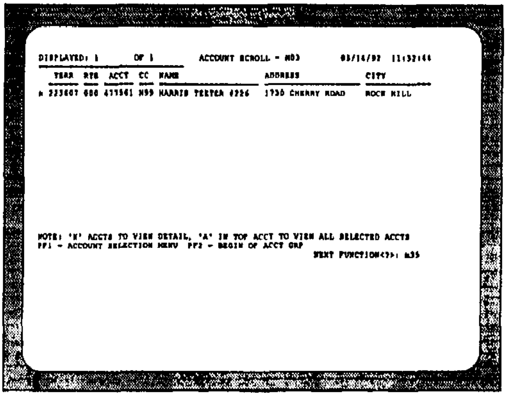
PACKAGE	TYPE	NUMBER	CARTON	TYPE	NUMBE

PDI

COMMENTS/INFORMATION: Store Closed.

51846 7473

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000


DISPLAYED: 1 OF 1 ACCOUNT SCROLL - M03 [illegible]

TERR	RTE	ACCT	CC	NAME	ADDRESS	CITY
x 223607	600	477561	N99	HARRIS TEETER #226	1730 CHERRY ROAD	ROCK HILL

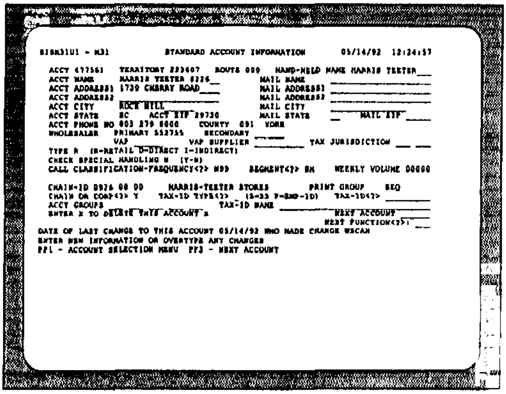
NOTE: 'X' ACCTS TO VIEW DETAIL, 'A' IN TOP ACCT TO VIEW ALL SELECTED ACCTS
PF1 - ACCOUNT SELECTION MENU PF2 - BEGIN OF ACCT GRP
NEXT FUNCTION<?>: m35

1. Verify that name and Territory number are the same as on Form 7101.
2. If contracts need to be ended prior to the deletion date, type m35 after NEXT FUNCTION<?>:, x in front of the Territory number, and press [ENTER]. Then, follow instructions found in Contracts Maintenance section.
3. If there are no contracts or if a cancellation occurs as of the deletion date, type x at far left and press [ENTER].

51846 7474

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



1. At the Standard Account Information screen after ENTER X TO DELETE ACCOUNT (lower left), type x and press [ENTER]. Screen will respond with PRESS ENTER TO CONFIRM THAT THIS ACCOUNT IS TO BE DELETED.

2. Press [ENTER] again to delete the account. Screen will respond with ** W A R N I N G ** notice to remind you to end existing contracts. Deleting the account ends all contracts in the same month as the deletion. If contracts are to be deleted prior to the deletion date, you must access Review Contracts.

Changing Account

To change standard information on an account:

1. At the Master List Account Selection Menu, after ACCOUNT NUMBER (upper left), type the account number and press [ENTER].

2. At the Account Scroll - M03 screen, type x at far left (beside number under TERR). At <?>: (lower right), type m31 and press [ENTER].

3. At the Standard Account Information screen, overtype new information from the 7101 form and press [ENTER].

Proper and accurate adjustment of contracts in the SIS system is critical. RJR has millions of dollars in contractual liabilities — obviously, accuracy is essential.

51846 7475

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

TAX STATUS: **TAX PAYER IDENTIFICATION INFORMATION**

___ CORPORATION (Signature Only)

Corporate Representative ____ Signature & Title ____ Date ____

___ INDIVIDUAL OR PROPRIETOR (Complete A)

(A) For Individuals and Sole Proprietors use Social Security Number and Name.

[ ][ ][ ] - [ ][ ] - [ ][ ][ ][ ]
Social Security Number

(Owner's Name as shown on SS Card) ____ Signature & Title ____ Date ____

___ PARTNERSHIP, TRUST OR ESTATE (Complete B)

(B) For Partnerships, Trusts, Estates and Others use the Employer Name and Identification Number.

[ ][ ] - [ ][ ][ ][ ][ ][ ][ ]
Employer Identification Number

(Employer's Name as shown on IRS Form 8501) ____ Signature & Title ____ Date ____

___ EXEMPT (EXPLAIN) (Signature Only)

EXPLAIN ____

NOTE: All Accounts MUST have a Signature, Title and Date!!

Signature ____ Title ____ Date ____

Function

A = ADD
E = END
D = DELETE
C = CHANGE

FUNCTION	CONTRACT TYPE	PLAN	UNITS	EFFECTIVE
E	PCD	4L	01	692
A	PREF. PRES	ABC	01	792
A	PREF. PR CTR	4L3	01	792

MERCHANDISERS

PACKAGE	TYPE	NUMBER	CARTON	TYPE	NUMBE

PDI

COMMENTS/INFORMATION: ____

51846 7476

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

RJRT Form 7101 - Rev 3/81
Item No 071019

RJR STANDARD ACCOUNT INFORMATION

NAME: J. Smith

CODE [ ] NEW ACCOUNT [X] CHANGE ACCOUNT [ ] DELETE ACCOUNT DATE: 6-15-92

ACCOUNT 200710 *(New Accounts will be assigned number by computer)*

TERRITORY 223609 ROUTE [ ] HAND-HELD NAME Tenneco #60638

ORDER-ENTRY NUMBER [ ]

ACCOUNT NAME AND ADDRESS
NAME
ADDR 1
ADDR 2
CITY
STATE ACCT. ZIP

Example 7101

MAILING NAME AND ADDRESS
(Enter if different from above)
Name
ADDR 1
ADDR 2
CITY
STATE MAIL ZIP

ACCOUNT PHONE NUMBER (AREA CODE) [ ] [ ] [ ]

PRIMARY WHOLESALER [ ] SECONDARY WHOLESALER [ ]

VAP WHOLESALER [ ] VAP SUPPLIER [ ]

TAX JURISDICTION [ ] [ ]

TYPE [ ] R = RETAIL I = INDIRECT CHECK SPECIAL HANDLING Y/N [ ]

CALL CLASSIFICIATION FREQUENCY N 9 9

SEGMENT [ ]

RETAIL		INDIRECT
CN = Convenience	OH = Other	CW = Chain Whse.
DG = Drug	RB = Rest/Bar	IN = Institution
DT = Discount	SF = Small Food	MI = Military
GS = Gas Station	SM = Supermarket	TD = Tob. Distr.
IN = Institution	SS = Superstore	VE = Vendor
LQ = Liquor	TB = Tobacco News	WG = Whsle. Groc.
MI = Military	UN = Univ/College	OF-Office

51846 7477

WEEKLY VOLUME [ ]

IS THIS ACCOUNT A CHAIN? Y/N [ ] SIS CHAIN ID NO. [ ] *(DIVISION OFFICE FILL IN)*

(IF YES, CHAIN HEADQUARTERS NAME) [ ] CHAIN DISTRICT/BRANCH [ ]

Has account tax status changed?
or
Is this a new account?

If yes to either, complete Taxpayer Identification Information on reverse.

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Adjusting Contracts

1. At the Master List Account Selection Menu, after ACCOUNT NUMBER (upper left), type in the account number (see example 7101 form) and press [ENTER].
2. At the Account Scroll - M03 screen, type x at far left (beside number under TERR).
3. At NEXT FUNCTION <?>:, type m35 and press [ENTER].
   - **NEXT ACCOUNT** - Enter the SIS account number of the next account to be viewed/updated.
   - **DATE OF LAST CHANGE TO THIS ACCOUNT** - Display field indicating when this account was last modified.
   - **WHO MADE CHANGE** - Display field indicating who made the last change to this account.
   - **OPTIONS** - Enter or overtype the new information and press [ENTER] to make changes.
   - **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].

PF Keys

Valid PF keys are:

- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.

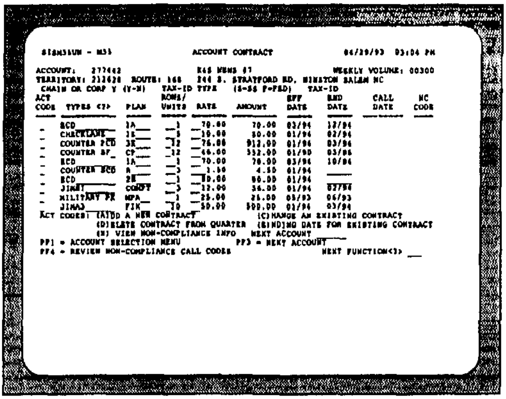
51846 7478

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

M35 - View/Update Contracts

This function allows you to view and update (limited by security) a contract for an account.


ACCOUNT CONTRACT 04/29/93 03:04 PM

ACCOUNT: 277442 WEEKLY VOLUME: 00300

TERRITORY: 212620 ROUTE: 168 244 S. STRATFORD RD, WINSTON SALEM NC

CHAIN OR CORP Y (Y-N) TAX-ID TYPE (S-SS F-FED) TAX-ID

ACT CODE	TYPES <7>	PLAN	ROWS/ UNITS	RATE	AMOUNT	EFF DATE	END DATE	CALL DATE	NC CODE
-	ECD	1A	1	70.00	70.00	03/94	12/94		
-	CHECKLANE	1B	5	10.00	50.00	01/94	02/94		
-	COUNTER PCD	3R	12	76.00	912.00	01/94	03/94		
-	COUNTER BF	CP	12	46.00	552.00	01/90	03/96		
-	ECD	1A	1	70.00	70.00	03/94	10/94		
-	COUNTER ECD	A	3	1.50	4.50	01/94			
-	ECD	2B	1	90.00	90.00	01/94			
-	JIMMY	CONFT	3	12.00	36.00	01/94	02/94		
-	MILITARY PR	MPA	1	25.00	25.00	05/93	06/93		
-	JIMADJ	FIK	10	50.00	500.00	01/94	03/94		

ACT CODES: (A)DD A NEW CONTRACT (C)HANGE AN EXISTING CONTRACT
(D)ELETE CONTRACT FROM QUARTER (E)NDING DATE FOR EXISTING CONTRACT
(N) VIEW NON-COMPLIANCE INFO NEXT ACCOUNT

PF1 = ACCOUNT SELECTION MENU PF3 = NEXT ACCOUNT

PF4 = REVIEW NON-COMPLIANCE CALL CODES NEXT FUNCTION<3>

As the SC receives notification, changes are necessary (via 7101 - see 7101 entry). This screen is utilized to change, end or open new contracts. Following is a description of each file.

Field Descriptions

- **ACT CODE (x)** - *This code is used to perform an activity on a contract.* See the bottom of the Account Contract screen for valid options.
- **TYPE (x -1 - x)** - Identifies the type of RJR contract for the account.
- **PLAN (xxxxx)** - Identifies the type of plan associated with a contract. There may be multiple plans for a given contract available. The 7101 will indicate the proper plan.
- **ROWS/UNITS (nnn)** - The number of rows or units to be maintained by RJR on a merchandiser for this contract.
- **RATE (x - 7 - x)** - The contracted amount established for each row.
- **AMOUNT** - The total amount of the contract calculated by multiplying rows/units by the rate.

51846 7479

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **EFF DATE** (mm-yy) - The effective start date of the contract.
- **END DATE** (mm-yy) - The expiration date of the contract.
- **CALL DATE** - The last date a Sales Rep made a call on this account.
- **NC CODE** - Reason code for contract non-compliance.
- **NEXT FUNCTION** (xxx) - Enter a function number to continue and press [ENTER].

PF Keys

Valid PF keys are:

- [PF1] - Returns to the Account Selection Menu.
- [PF3] - Allows you to view the next account from the scroll list within this function.
- [PF4] - Displays the list of non-compliance call codes.
- ? under "Types" will generate a list of contract plans. Press [ENTER] to scroll through plans and make a selection.
- To end or change a new contract, the following information must be on 7101:
  - Types (plans)
  - Row (units)
  - Effective date
- After entering, press [ENTER] to make changes.
- To continue entering 7101 after NEXT ACCOUNT, type the next account number and press [ENTER].

51846 7480

Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

7101 Errors

It is likely that the SC will encounter 7101 errors from time to time. It is important *first, to minimize these errors and second, catch errors as they appear.*

1. The SC should familiarize themselves with possible errors.
2. Use the following form to note any problems. Attach the form to 7101 and return to the Sales Rep for correction.
3. It may be necessary to review volume requirements for various contracts. See following form for Contract Requirements.

Date Returned ____________ Div/Rep __________

Missing Sis Account Number	
Invalid Or Unauthorized Account Number	
Need Assignment Number To Transfer	
Please Furnish Highlighted Information For New Call	
Please "Print" Name As Written On Tax Form	
Need Ending Dates For Contracts To Delete An Account	
Please Furnish Effective Date For Contract	
Duplicate E Contracts	
Incorrect Type/Plan Of Contract	
Invalid Contract For Volume	
No Contract(S) Attached	
Contract Does Not Agree With 7101	
No Chain Id Number Entered	
Contract is not open on Chain Headquarter screen. Please contact CAM via Sales Comm Memo to verify contract/get approval and resubmit.	

51846 7481

 Copyright © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

51846 7482

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

LABOR REPORTING

Summary

The Systems Coordinator (SC) is charged with administering Labor Reporting for all Region regular and part-time personnel. The following sections cover the tasks involved in this administration for part-time and full-time respectively.

Part-Time Labor Reporting

- Set up answering machines at the Operations Unit office to allow PT to call in hours worked and mileage.
  - Provide one answering machine per 50-60 part-time personnel.
  - Communicate procedures for utilizing machine to personnel.

  See example on next page.

- Transcribe information from the answering machine. Utilize each Division's Time and Attendance worksheet to write down hours worked and miles driven as reported via the answering machine.
  - This worksheet is sent to the Operations Unit printer from Winston-Salem every two weeks. The worksheet for each pay period normally arrives 2-3 weeks before it is needed.
  - This worksheet con also be requested utilizing Functions 6 (regular employees) or 7 (part-time employees) in LRS.

  An example of a worksheet follows.

51846 7483

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

LRS-TIME AND ATTENDANCE RECORD GLH160BS

RUN DATE: 07/06/93 RUN TIME: 11:

PERIOD NO: 14 PERIOD ENDING: 07/04/93 PAGE

CORP: 04 R J REYNOLDS TOBACCO DEPT: 6328 DULUTH MINN SHIFT: 8

LOC: PAY: 8

NAME / ACCOUNT		MON	TUE	WED	THU	FRI	SAT	SUN
	WK1->	06/21	06/22	06/23	06/24	06/25	06/26	06/27
	WK2->	06/28	06/29	06/30	07/01	07/02	07/03	07/04
ACCOUNT		H R S	H R S	H R S	H R S	H R S	H R S	H R S
K L BOUNDS								
824523	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
D A DENNIS								
831830	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
S A DOERR								
831027	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
S S GUENTHER								
826351	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
C K JAMES								
830448	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
G K LANGNESS								
827468	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
J P LEGER								
831593	WK1->							
	WK2->							
MILES=	TOTAL HRS=							
L S POPE								
827621	WK1->							
	WK2->							
MILES=	TOTAL HRS=							

51846 7484

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Issued: 8/93

LABOR REPORTING

5

Reporting of Full-Time and Part-Time Labor Hours

- All hours (both FT and PT) must be entered and approved no later than 1:00 PM eastern time on the Tuesday following the end of the reporting period. Exception: If Monday is a holiday, entry deadline will be Tuesday at 6:00 PM (unless otherwise advised). You may begin entering hours/mileage with Friday of the second week of the payroll period. You may enter/approve as many times as needed prior to cutoff.

Procedures

1. Every Monday morning, the SC should transcribe all information on the answering machines:
   - Arrange Division spreadsheets for easy access.
   - As the SC plays back the answering machine, hours worked and mileage should be recorded on the appropriate Division worksheet.
2. Once all messages are transcribed, the SC should organize all worksheets into piles, by Division, and hold until the final week of the pay period.
   - If the week being reported is the first week of the pay period, hold all worksheets until the following week. Then, after transcribing the second week's data, the two packets should be attached for further processing.
3. Once packets have been compiled for each Division in the Region, the SC should access the LRS system to enter and approve all labor totals.

51846 7485

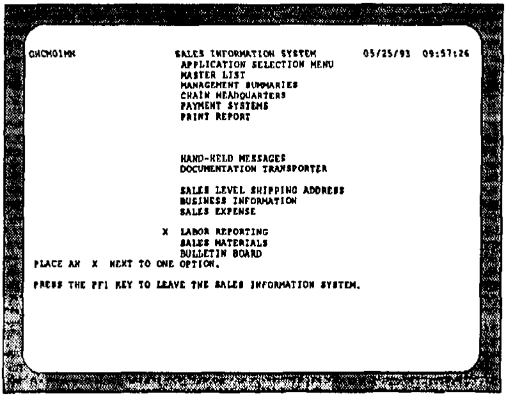
© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

How to Use LRS

Due to the sensitive nature of LRS and other personnel activities, the Systems Coordinator is the only person at the Operations Unit authorized to access these systems and approve hours reporting.

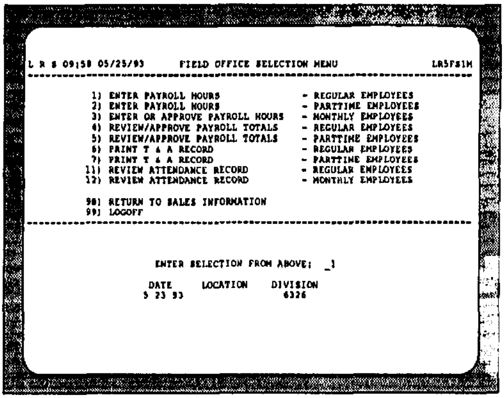
1. Select Labor Reporting from the SIS main menu by typing "X" and press [ENTER].



51846 7486

© R.J. Reynolds Tobacco Company 1993

2. If there are any messages, they will be displayed. Press [ENTER] to access the LRS Main Menu.



```
L R S 09:58 05/25/93      FIELD OFFICE SELECTION MENU          LRSFSIM
--------------------------------------------------------------------------
      1) ENTER PAYROLL HOURS                 - REGULAR EMPLOYEES
      2) ENTER PAYROLL HOURS                 - PARTTIME EMPLOYEES
      3) ENTER OR APPROVE PAYROLL HOURS      - MONTHLY EMPLOYEES
      4) REVIEW/APPROVE PAYROLL TOTALS       - REGULAR EMPLOYEES
      5) REVIEW/APPROVE PAYROLL TOTALS       - PARTTIME EMPLOYEES
      6) PRINT T & A RECORD                  - REGULAR EMPLOYEES
      7) PRINT T & A RECORD                  - PARTTIME EMPLOYEES
     11) REVIEW ATTENDANCE RECORD            - REGULAR EMPLOYEES
     12) REVIEW ATTENDANCE RECORD            - MONTHLY EMPLOYEES

     98) RETURN TO SALES INFORMATION
     99) LOGOFF
--------------------------------------------------------------------------

               ENTER SELECTION FROM ABOVE:  _1

               DATE      LOCATION    DIVISION
              5 23 93                  6326
```

3. The LRS Field Office Selection menu is the location from which all Labor reporting is initiated. This screen displays the list of functions possible and the employee categories to whom each selection applies.

To make a selection:

- Type information in the following fields:
  - **FUNCTION** - Type the number of the desired function.
  - **DATE** - The biweekly period ending date currently being processed by Winston-Salem will appear.
  - **DIVISION** - Type the number of the Division for which information needs to be processed.
- Press [ENTER].

51846 7487

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. Following is a description of each option available on LRS. Several of these functions will be used infrequently. An explanation of these functions is included:

   - FUNCTION 1 - ENTER PAYROLL HOURS (REGULAR-Full-Time) - This function allows you to enter and approve payroll hours for regular employees.
   - FUNCTION 2 - ENTER PAYROLL HOURS (PARTTIME) - This function allows you to enter and approve payroll hours for part-time employees.
   - FUNCTION 3 - ENTER OR APPROVE PAYROLL HOURS (MONTHLY) - Because Region Operations has no Monthly employee, this function will not be used.
   - FUNCTION 4 AND 5 - REVIEW/APPROVE PAYROLL TOTALS (REGULAR AND PARTTIME) - This function allows you to look at the current and prior biweekly period to verify hours/mileage keyed into system. The SC has approval authority for personnel administration; as a result, this approval function has been incorporated into Functions 1 and 2.
   - FUNCTION 6 - PRINT T&A RECORD (REGULAR-Full-Time) - This function allows you to request a form that is automatically printed the second Friday of each payroll period to be used to record hours prior to inputting.
   - FUNCTION 7 - PRINT T&A RECORD (Part-Time) - This function performs the same as selection"6", except this function is for recording hours/mileage of part-time employees.
   - FUNCTION 11 - REVIEW ATTENDANCE RECORD (REGULAR-Full-Time) - This function allows you to review attendance records for regular employees.
   - FUNCTION 12 - REVIEW ATTENDANCE RECORD (MONTHLY) - This function allows you to review attendance records for monthly employees.

   Remember: While these functions are labeled as "enter" functions, LRS will allow the "approved" Systems Coordinator to process all the way through to final approval.

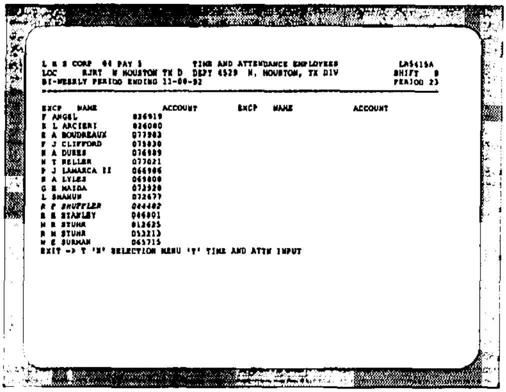
5. To process labor hours, select Function 1 for regular employees or Function 2 for part-time employees or 3 for monthly employees. Press [ENTER].

6. Depending on the function chosen, this screen will list all eligible employees listed within the operating unit selected, alphabetically. Place an "X" under EXCP column, next to each employee who has exception time to be keyed.

51846 7488

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000



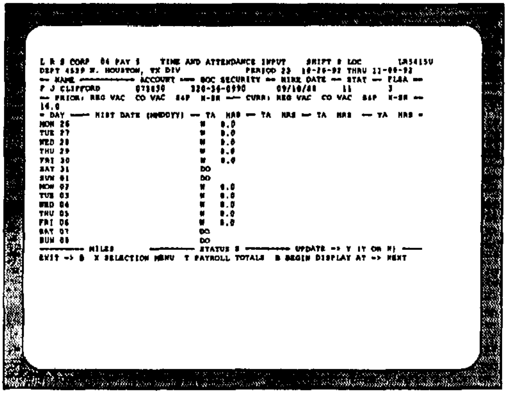
- For regular, full-time employees, the system assumes a normal 80-hour biweekly schedule. If, for any reason, the employee does not work a regular 80 hour schedule, type "X" by the employee's name to indicate an exception must be entered. REMEMBER — **If a regular employee works standard hours, no data entry is required.**

- Since part-time employees work a variety of hours, every possible active employee should be indicated for exception by typing "X" next to their name. The system assumes that part-time employee did not work and *will not pay employee, if not selected as exception.*

7. After an operating unit employee's exception list has been selected, each employee will have an individual screen appear, in alphabetical order, for entry of exception data.

51846 7489

© R.J. Reynolds Tobacco Company 1993



This Time and Attendance Input screen displays a time and attendance code of "W" and standard hours (8.0) except as follows:

- Standard hours (per STD HRS table) = 0.0 for part-time employees.
- DO is displayed on Saturday and Sunday, when standard hours are zero.
- If exception data has already been entered for an employee, the screen displays the exception input
- If the biweekly period includes a day that is a Company-declared holiday, "H" (or "HT" for part-time) is displayed.
- If your department has observed a regional holiday, you will need to enter the "RH" code.

Data can be entered for the following fields:

- **TA CD** - Valid time and attendance codes per the validation table include:

51846 7490

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

T&A Codes - Regular Employees

LRS T&A CODES #5 REGULAR EMPLOYEES							
T&A CODE	Conv T&A	Descr	FLSA	S&P BAL	XSK BAL	VAC BAL	PAI
P	EP	Personal - S&P	1	Y			Y
	VP	Personal - VAC	1	0		Y	Y
	E1	Personal - Exempt	3				Y
S	SS	Sick - S&P	1	Y			Y
	EX	Sick - Extra Sick	1	0	Y		Y
**	VS	Sick - VAC	(1)	0	0	Y	Y
	S1	Sick - exempt	3				Y
DO	DO	Day Off					N
H	H	Holiday					Y
HT	HT	Holiday - Part-time					Y
IC		Workers Comp - Full Pay - Exempt & Non-Exempt - Paid					
I2		Workers Comp - Half Pay - Non-Exempt Only - Paid					
MA	MA	Minus Adjustment					Y
NO	NO	No Pay					N
OT	OT	Overtime					Y
PA	PA	Plus Adjustment					Y
PY	PY	Paid Time Out (use misc. code for funeral leave, military, etc.)					Y
RH	RH	Regional Holiday					Y
SC	SC	Salary Cont (full pay)					Y
S2	S2	Salary Cont (half pay)					Y
V	V	Vacation					Y
VH	VH	Vacation - Half Day					Y
W	W	Worked					Y

- HRS - Hours (to the tenth) to be associated with T&A Code.
- HISTORY OVERRIDE DATE - Date (MMDDYY) to be added to attendance history with this T&A entry, if other than the displayed date. Prior period dates are accepted, future dates are not. This date field is only used to add an absence to history. It is not used for changing or deleting data on attendance history.

◆ *Note:* If the no pay code (NO) is used with the History Override date, the system will deduct hours (pay) in the current week.

51846 7491

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

T&A Codes - Part-Time Employees

T&A CODES CONVERSION:

The codes listed under the T&A Code column should be used when keying exception time. The P and S codes are converted by the system. The minimum hours allowed for the following codes is 0.1 hour, the maximum is 8.0.

LRS T&A CODES #8 PART-TIME EMPLOYEES

T&A CODE	Conv T&A	Descr	FLSA	S&P BAL	XSK BAL	VAC BAL	PAID
HT	HT	Holiday - PT					Y
MA	MA	Minus Adjustment					Y
NO	NO	No Pay					N
OT	OT	Overtime					Y
PA	PA	Plus Adjustment					Y
RH	RH	Regional Holiday					Y
W	W	Worked					Y

EXIT OPTIONS

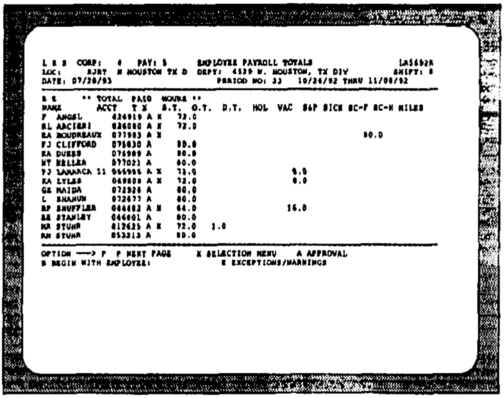
- B - Time and Attendance Input screen for next selected exception employee. You can override the next employee by entering the last name of the desired next employee.
- T - to review employee payroll totals, this is the default after all selected exception employees have been displayed.
- X - Return to the Selection Menu.

8. After all exception time has been keyed for employees in the operating unit, the System will move on to the Review and Approval screen. The SC should review these screens to ensure accuracy of the data for all employees. Employees will be paid per the reflected payroll totals.

51846 7492

© R.J. Reynolds Tobacco Company 1993

Issued: 8/93



L R S CORP: 4 PAY: 5 EMPLOYEE PAYROLL TOTALS LA5692A
LOC: RJRT N HOUSTON TX D DEPT: 4539 N. HOUSTON, TX DIV SHIFT: 8
DATE: 07/28/93 PERIOD NO: 33 10/26/92 THRU 11/08/92

NAME	ACCT	T	X	S.T.	O.T.	D.T.	HOL	VAC	S&P	SICK	SC-F	SC-H	MILES
P ANGEL	424919	A	X	72.0									
RL ARCIERI	826080	A	X	72.0									
RA BOUDREAUX	077983	A	X								80.0		
FJ CLIFFORD	075830	A		80.0									
KA DUKES	076909	A		80.0									
MT KELLER	077021	A		80.0									
PJ LAMARCA II	066986	A	X	71.0				9.0					
KA LYLES	069808	A	X	72.0				8.0					
GE MAIDA	072928	A		80.0									
L SHANUN	072677	A		80.0									
RP SHUFFLER	044482	A	X	64.0				16.0					
RE STANLEY	046601	A		80.0									
MR STUHR	412625	A	X	72.0	1.0								
RM STUHR	053213	A		80.0									

OPTION ---> P P NEXT PAGE X SELECTION MENU A APPROVAL
B BEGIN WITH EMPLOYEE: E EXCEPTIONS/WARNINGS

Field descriptions include:

- **NAME** - The employee's name.
- **ACCOUNT** - The employee's account number.
- **APPROVAL STATUS**
- **EXCEPTION STATUS** (X - exception data was entered):
  - ST - Total straight time hours paid
  - OT - Total overtime hours paid
  - DT - Total double time hours paid
  - HOL - Total holiday hours paid
  - SICK - Total sick hours paid
  - VAC - Total vacation hours paid
  - S&P - Total sick and personal hours paid
  - SC-F - Total salary continuation hours paid at full pay
  - SC-H - Total salary continuation hours paid at half pay
  - MILES - (total miles for part-time employees only)

51840 7453

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

EXIT OPTIONS

- A - Approve employee data and return to selection menu. Utilize this option for final approval.
- P - Next Page if additional employees in Division
- X - Return to Selection Menu

51846 7494

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

CHAPTER 6
Expense Reports

51846 7495

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

EXPENSE REPORTS

Preliminary Notes

- With the Region Operations Manager, the SC should establish a cutoff day for submission of expense reports. Reports submitted after this day will be held over until the next reporting period.
- The SC should put together a list of analysis codes commonly used by sales employees. A complete, up-to-date list of ALL codes is available by accessing Analysis Code Inquiry, then selecting the most commonly needed codes for compilation into list form for distribution to the Field. A current code sheet is included in Book I - Region Setup.
- The SC should contact Sankey Moore-Painter to coordinate the issuance of an Operating Unit Payment Authorization Code. A unique code must be issued to allow the SC access to approval for all Divisions in the Region.

Processing Expense Reports

1. All Region full-time sales personnel will submit expense reports at the close of each biweekly reporting period. Expense reports should be organized into sections, by Operating Unit/Division, to allow for efficient entry.
2. Once the cutoff day arrives, the SC begins entry of data into the Sales Expense System. This process is initiated by accessing the system via the main SIS menu.

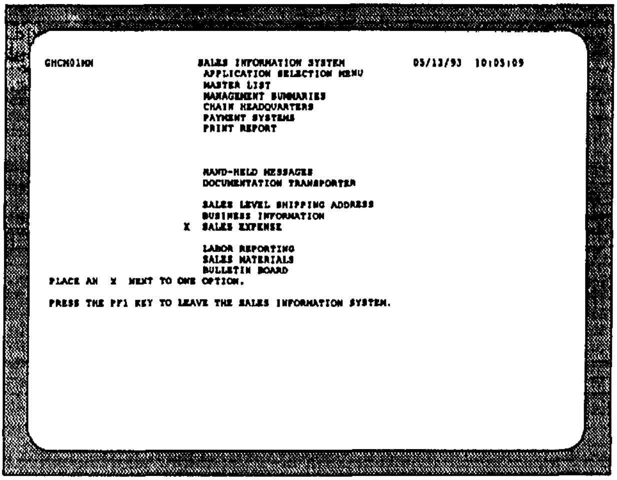
51846 7496

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Accessing SES

1. With the SIS Main Menu displayed, place an "X" beside the SALES EX-PENSE option. Press [ENTER].



51846 7497

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

2. The Field Sales Expense Menu will be displayed. Each option is reviewed on the following pages.

```
GFJ000MN          F I E L D   S A L E S   E X P E N S E          05/13/93
                     FIELD OFFICE MAIN MENU

                  1). START A BATCH
                  2). RESTART A BATCH
                  3). DELETE A BATCH
                  4). PRINT A BATCH
                  5). APPROVE A BATCH FOR PAYMENT
                  6). CHANGE AN EXPENSE REPORT
                  7). DELETE AN EXPENSE REPORT
                  8). VIEW/PRINT EXP RPT INSTRUCTIONS
                  9). SALES EXPENSE CODE INQUIRY
                 10). SALES ANALYSIS CODE INQUIRY
                 11). CAR MASTER SYSTEM
                 12). PAYMENT HISTORY (A/P)
                 13). BATCH CONTROL INQUIRY
                 14). EMPLOYEE MASTER INQUIRY
                 15). PERSONAL/COMMUTING MILEAGE INQUIRY
                 98). RETURN TO SALES INFORMATION

                 ENTER SELECTION FROM ABOVE: __
```

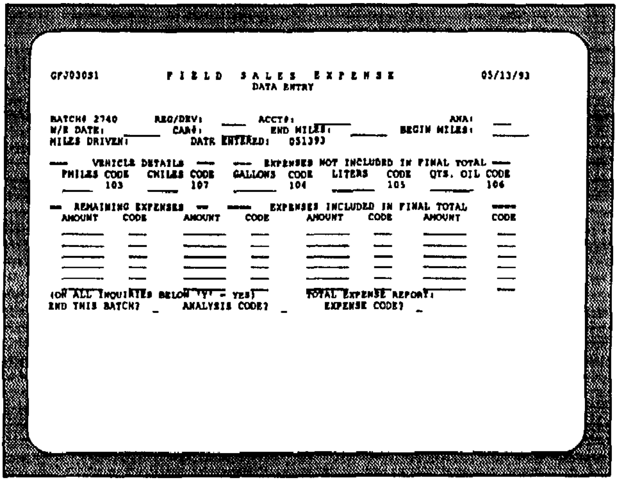
51846 7498

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Start a Batch

1. At the Sales Expense main menu, type 01 in the blank to begin the processing of that week's "batch" of expense reports.



2. The FIELD SALES EXPENSE DATA ENTRY screen is displayed. The computer automatically assigns a batch number. While the SC can obtain this information via the system, it is wise to write down the batch number for quick retrieval. Data entry may now begin. Type data in the following fields:

   - **REG/DIV** - The four digit Region/Division code. The code must be the current or prior department code for the employee account number entered.
   - **ACCT #** - The employee account number of the HRIS file. It must be a valid combination with the Region/Division code entered.
   - **ANA** - The three-digit analysis code from the Analysis Code Table field maintained by Accounts Payable Monitoring:
     - a regular expense report (analysis code - 000) can only be submitted once per biweekly expense period.
     - If a sales rep drives another COMPANY car other than the one initially assigned, analysis code 001 must be used for expenses related to THAT vehicle.

51846 7499

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- If the expenses are for a SPECIAL CODED MEETING, then the analysis code must be in a 600 series. The employee submitting the expense report normally has the proper code.

- **W/E/DATE** - The week ending date. It must be a valid week ending date from the Week Ending Date Table File maintained by APM. At this time, all expense reports must have a valid SUNDAY ending date.

- **CAR #** - The 6-digit car number. It must be a valid number from the Car Master file maintained by Fleet, unless the car number is blank or zeros.
  - The car number is blank or zero only if the salesperson used a rental car for the reporting period.
    - In this case, code 102 (personal mileage) and 300 series codes may be charged
    - All other car expenses must be charged to Transportation (code 350)
  - If a car number is entered, all auto expenses will be charged to that car for PH&H processing.

- **END MILES AND BEGIN MILES** - Beginning and ending miles must be entered if a car number is entered.

- **EXPENSE CODE** - For each quantity entered, a valid expense code must be given. The code entered must reside on the Table Master File maintained by Sales Service Monitoring. These codes should be obtained and copied for quick retrieval.

  ❖ *Note:* Type a decimal point to show cents or tenths for those fields containing quantities or amounts.

3. After expense report data has been entered, the END THIS BATCH? field asks ACCEPT THIS REPORT?. If the report is correct, accept the report by typing "Y" in the ACCEPT field and press [ENTER]. The system will detect and notify the SC of errors by highlighting the category with a "*" beside the field. To correct an error

   - Place the cursor at the field
   - Type the correction
   - Press [ENTER] and continue

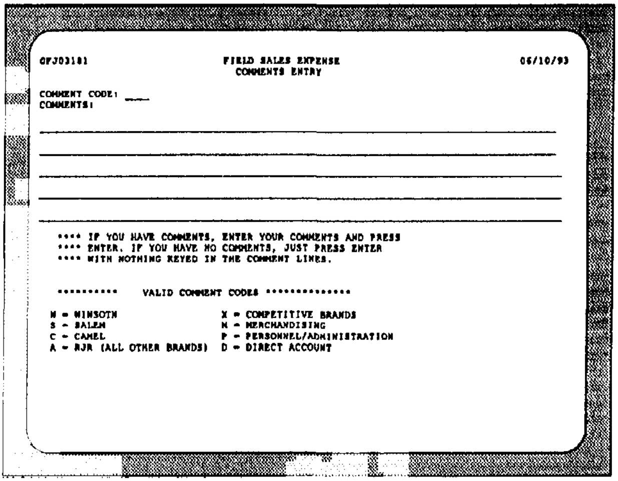
51846 7500

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The Field Sales Expense Comments entry screen is displayed next. If the employee has submitted one or more comments with the expense report, the comments are to be communicated to Winston-Salem utilizing this screen.

   ♦ *Note:* The system now requires you to enter a valid comment code to categorize the comments submitted. Press [ENTER] to continue.



   ♦ *Note:* Five lines with 76 positions per line are available for comments. SES will return to the main data entry screen for the next report. Continue processing until complete.

5. When the SC has completed the final expense report for each operating unit, [TAB] to the END THIS BATCH field. Type "Y" in the field and press [ENTER].

6. The Main Menu is now displayed. A detail report of each batch (per Division) should be printed as each batch is completed. 51846 7501

   - Select 04, Print a Batch at the prompt.
   - A report of the batch of expense reports just entered will be automatically routed to the Operations Unit printer.

7. Review the Batch Report for errors not detected during the entering process.

© R.J. Reynolds Tobacco Company 1993

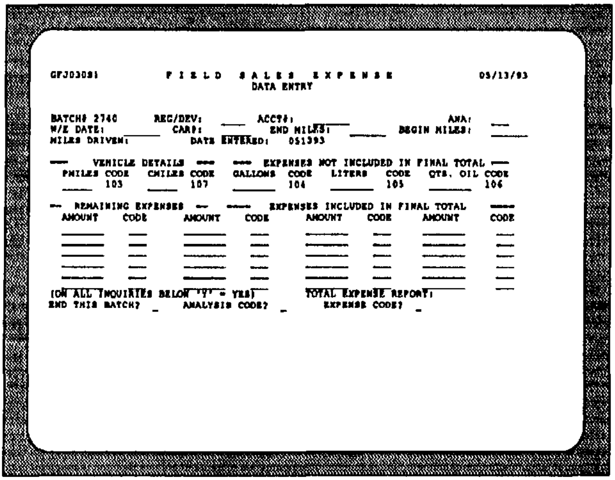
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Restart a Batch

This function is available for several reasons. First, the Systems Coordinator has established a cutoff date for expense report submission, occasionally a report will arrive late, which for reason or another, needs to be added to the batch. Second, as expense reports are being processed, other issues may arise that cause the SC to leave the Sales Expense System before a batch is totally complete. In both cases, it is necessary for the SC to add one or more expense reports to an existing batch.

1. From the Main Sales Expense menu, type 02 RESTART A BATCH at the prompt and press [ENTER].

2. The system redisplays the main menu with the additional field ENTER THE BATCH NUMBER beneath the original prompt. Type the desired batch number and press [ENTER].



3. Enter in the expense report data as previously instructed.

◆ *Note:* If the expense reports arrive after the preestablished cutoff date, the SC should not process reports until the next reporting period.

51846 7502

© R.J. Reynolds Tobacco Company 1993

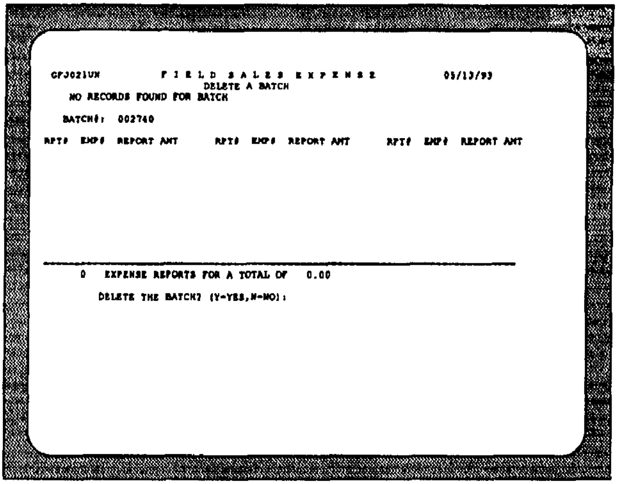
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Delete a Batch

While improbable, it is possible it may be necessary to delete an entire batch of expense reports from the system. For such a deletion to take place, the ReSion Operations Manager or appropriate Division Manager would contact the PC with instructions.

1. At the Sales Expense Main Menu, type 03 at the prompt and press [ENTER].

2. The Main menu is redisplayed with the additional field ENTER THE BATCH NUMBER beneath the original prompt. Type the desired batch number and press [ENTER].



3. The *Field Sales Expense Delete a Batch* screen is displayed. Type "Y" at the delete the batch field prompt and press [ENTER]. The batch will be automatically deleted from this system and will have a status of "2" if accessed by BATCH CONTROL INQUIRY function 13.

51846 7503

 © *R.J. Reynolds Tobacco Company 1993*

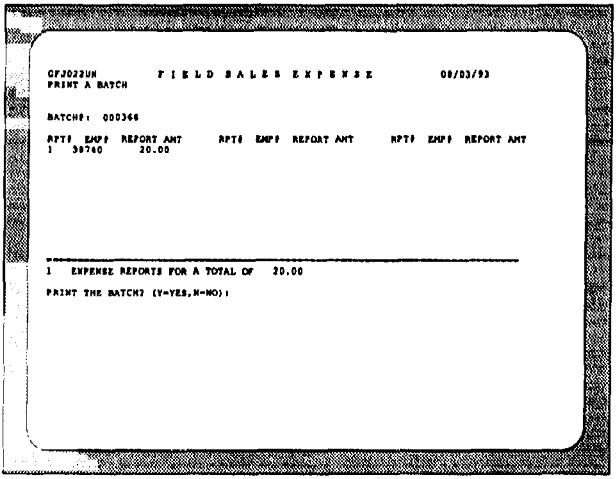
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Print a Batch

This function displays all expense reports within a requested batch. The expense reports are in a summarized format with a final total showing the total number of expense and dollar amount for the batch.

1. At the Sales Expense Main Menu, type 04 in the "ENTER SELECTION FROM ABOVE" field and press [ENTER].

2. The Main menu is redisplayed with the additional field ENTER THE BATCH NUMBER beneath ENTER SELECTION FROM ABOVE field. Type the desired batch number and press [ENTER].



3. The *Field Sales Expense Print a Batch* screen is displayed. If you want to print the report, type "Y" in the PRINT THE BATCH field and press [ENTER].

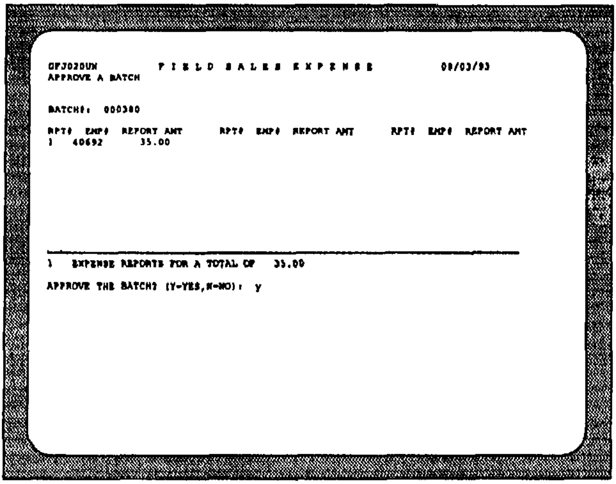
51846 7504

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Approve a Batch for Payment

Once the preestablished cutoff date has been reached, and all expense reports have been entered into the system, the SC must approve each batch for payment.

1. From the Sales Expense Main Menu, type "05" at the prompt and press [ENTER].
2. The system redisplays the Main menu with the additional field ENTER THE BATCH NUMBER beneath the original prompt. Type the desired batch number and press [ENTER].
3. The system redisplays the Main Menu with the additional field ENTER THE PAYMENT AUTHORIZATION CODE beneath the original prompts:
   - Utilize the code issued by Sankey Moore-Painter to approve the batch
   - Type the code at the prompt and press [ENTER].
4. The *Field Sales Expense Approve a Batch* screen is displayed. Type "Y" in the ACCEPT A BATCH field and press [ENTER].



51846 7505

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. After the batch has been accepted, reports will print showing the detail and summary information for the accepted batch. Voucher numbers will automatically be assigned by the system for each expense report within the batch. These reports should be filed, by operating unit.

6. This process should be completed for each batch in the Region.

Several additional options are available via the Sales Expense System with regard to expense reports. The following options are available to change reports, view reports and other information online and obtain Analysis and Expense Codes.

Change an Expense Report

From time to time, it may be necessary to view a particular expense report and/or make corrections to it. As long as the batch has not been approved for payment, the changes may be made to any report.

1. From Sales Expense Main Menu, type 06 at the prompt and press [ENTER].

2. The system redisplays the Main Menu with the additional field ENTER THE BATCH NUMBER beneath the original prompt. Type the batch number containing the expense report and press [ENTER].

3. The system redisplays the Main Menu with the additional field ENTER THE EXPENSE REPORT NUMBER beneath the original prompts. This number is based on the sequential order the expense reports were originally input. If Rep A was the third report entered, type "3" and press [ENTER].

51846 7506

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

4. The Field Sales Expense Data Entry screen is displayed. This screen may be changed or simply viewed:

```
GTJ03101                    FIELD SALES EXPENSE                      06/10/93
                                DATA ENTRY

BATCH# 3321    REG/DEV:  6326   ACCT#: 51191                    ANA:
W/E DATE:   52393    CAR#:   10932   END MILES: 54321   BEGIN MILES 53953
MILES DRIVEN:  368    DATE ENTERED: 061093

-----------VEHICLE DETAILS ---   ---EXPENSES NOT INCLUDED IN FINAL TOTAL ----------
 PMILES  CODE  CMILES  CODE      GALLONS   CODE   LITERS   CODE   QTS OIL   CODE
  221    103   50      107       27.10     104    ______   105    ______    106

---REMAINING EXPENSES -------   ----- EXPENSES INCLUDED IN FINAL TOTAL -----------
AMOUNT    CODE  AMOUNT  CODE     AMOUNT    CODE     AMOUNT    CODE
31.55     210   10.79   240       31.33    330      2.03      340
______    ____  ______  ____     _______   _____    ______    ______
______    ____  ______  ____     _______   _____    ______    ______
______    ____  ______  ____     _______   _____    ______    ______
______    ____  ______  ____     _______   _____    ______    ______
______    ____  ______  ____     _______   _____    ______    ______
(ON ALL INQUIRIES BELOW "Y" = YES)   TOTAL EXPENSE REPORT: 75.50
END THIS BATCH? (Y = YES): ___  ANALYSIS CODE? __  EXPENSE CODE? ___
```

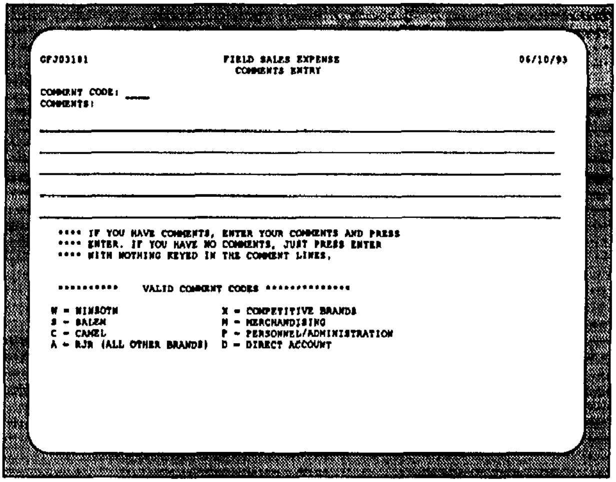
- To change, correct the appropriate field(s), type "Y" at the *Change Expense Report Type* prompt and press [ENTER]. The system updates the expense report with the changes just entered.
- If you do not need to make changes, type "N" in the CHANGE EXPENSE REPORT field and press [ENTER].

51846 7507

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. Whether you make changes or not, the system displays the Comments Entry screen. Press [ENTER] to continue.



```
GFJ03101            FIELD SALES EXPENSE            06/10/93
                      COMMENTS ENTRY

COMMENT CODE: __
COMMENTS:

**** IF YOU HAVE COMMENTS, ENTER YOUR COMMENTS AND PRESS
**** ENTER. IF YOU HAVE NO COMMENTS, JUST PRESS ENTER
**** WITH NOTHING KEYED IN THE COMMENT LINES.

**********   VALID COMMENT CODES **************

W = WINSTON                  X = COMPETITIVE BRANDS
S = SALEM                    M = MERCHANDISING
C = CAMEL                    P = PERSONNEL/ADMINISTRATION
A = RJR (ALL OTHER BRANDS)   D = DIRECT ACCOUNT
```

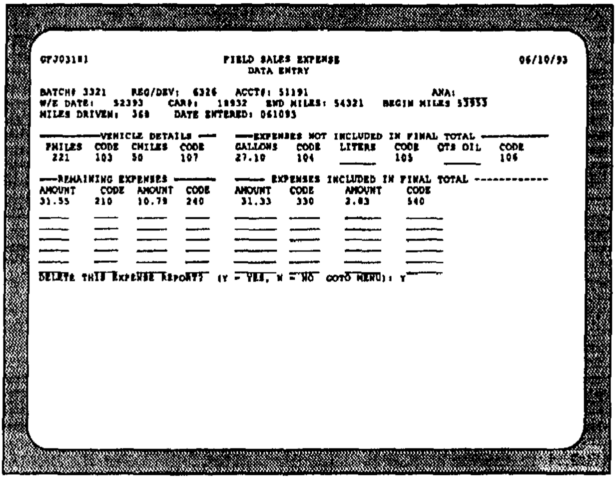
© R.J. Reynolds Tobacco Company 1993

51846 7508

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Delete an Expense Report

1. From Sales Expense Main Menu, type 07 at the prompt and press [ENTER].
2. The system redisplays the Main Menu with the additional field ENTER THE BATCH NUMBER beneath the original prompt. Type the batch number containing the expense report and press [ENTER].
3. The system redisplays the Main Menu with the additional field ENTER THE EXPENSE REPORT NUMBER beneath the original prompts. Type the desired expense report number and press [ENTER].
4. The Field Sales Expense Data Entry screen is displayed:



```
GTJ031#1                 FIELD SALES EXPENSE                    06/10/93
                             DATA ENTRY

BATCH# 3321   REG/DEV: 6326   ACCT#: 51191                 ANA:
W/E DATE:  52393   CAR#:  18932   END MILES: 54321   BEGIN MILES 53953
MILES DRIVEN:  368   DATE ENTERED: 061093

---------VEHICLE DETAILS ---   ---EXPENSES NOT INCLUDED IN FINAL TOTAL ---------
 FMILES  CODE  CMILES  CODE    GALLONS   CODE   LITERS   CODE   QTS OIL   CODE
  221    103   50      107     27.10     104    ______   105    ______    106

---REMAINING EXPENSES -------   ----- EXPENSES INCLUDED IN FINAL TOTAL ----------
AMOUNT   CODE  AMOUNT  CODE    AMOUNT   CODE    AMOUNT   CODE
31.55    210   10.79   240      31.33   330     2.03     540

DELETE THIS EXPENSE REPORT? (Y = YES, N = NO  GOTO MENU): Y
```

- To delete the report, type "Y" in the DELETE EXPENSE REPORT field and press [ENTER]. That specific expense report and any comments are deleted from the system , and the batch totals adjusted.
- If the SC does not wish to delete the report, type "N" in the DELETE EXPENSE REPORT field and press [ENTER].

51846 7509

© R.J. Reynolds Tobacco Company 1993

View/Print Expense Report

```
CFJ13082        F I E L D   S A L E S   E X P E N S E        08/03/93
FUNC
EXPENSE REPORT INSTRUCTIONS
INQUIRY SELECTION

SEL  SECTION                                SEL  SECTION
_    GENERAL INFORMATION                    _    OTHER (JOBBER SHORTAGES)
_    PAYROLL INFORMATION                    _    PROMOTIONAL EXPENSES
_    EXPENSE INFORMATION                    _    OFFICE EXPENSES
_    VEHICLES                               _    MISCELLANEOUS (ORIGINAL RECEIP
_    OTHER (LODGING)                        _    MISCELLANEOUS (GRAND TOTAL)
_    OTHER (MEALS)                          _    MISCELLANEOUS (EXPLANATION)
_    OTHER (ENTERTAINMENT)                  _    MISCELLANEOUS (COMMENT SECTION
_    OTHER (TELEPHONE)                      _
_    OTHER (POSTAGE)                        _
_    OTHER (SUPPLY STORAGE)                 _
_    OTHER (TRANSPORTATION)                 _
_    OTHER (FIXTURE INSTALLATION CO         _
_                                           _

TERMINATE LIST (Y=YES,DEFAULT=NO): _

PRINT EXPENSE REPORT INSTRUCTIONS: N (ALL SECTIONS)
```

1. From the *Sales Expense Main Menu*, type "8" at the prompt and press [ENTER].
2. Place "X" by the inquiry selection desired and press [ENTER].

51846 7510

Expense Code Inquiry

The Field Sales Expense - Expense Codes screen lists expense codes to be applied to amounts on a field rep's expense report. The expense codes in the system are the most current codes maintained by the Accounts Payable Monitoring Control Group. As stated in the preliminary instructions, the SC should have a list of current codes on hand for quick retrieval. These codes should also be compiled and sent to the Field. Two methods are available to obtain this list.

GFJ19281 F I E L D S A L E S E X P E N S E 08/03/93
EXPENSE CODES

CODE	DESCRIPTION	CODE	DESCRIPTION
102	TOTAL MILES DRIVEN	280	AUTO TAXES
103	PERSONAL MILES	290	MISC. VEHICLE EXPENSES
104	GAS GALLONS	295	PERSONAL MILES DEDUCTION
105	GAS LITERS	296	COMMUTING MILEAGE DEDUCTION
106	OIL QUARTS	297	PERSONAL MILEAGE ALLOWANCE
107	COMMUTING MILEAGE	298	COMMUTING MILEAGE ALLOWANCE
210	GASOLINE	300	CLUB DUES AREA VP'S ONLY
220	OIL	310	LODGING
231	PARKING/TOLLS PER DAY	320	BREAKFAST - YOURS ONLY/TRAVEL
232	STORAGE (GARAGE)	322	LUNCH - YOURS ONLY/TRAVEL
240	WASH PER WEEK	325	DINNER - YOURS ONLY/TRAVEL
250	MAINTENANCE	329	LOCAL RECOGNITION AWARD
270	AUTO LICENSE	330	ENTERTAINMENT

PAGE 1 OF 3 ENTER PAGE # (DEFAULT=NEXT PAGE 999=EXIT): ___
SUBMIT BATCH EXPENSE DESCRIPTION REPORT(Y/N): N

Expense Code Inquiry - Method 1

Utilize this method WHEN AN EXPENSE REPORT IS CURRENTLY BEING ENTERED:

1. To display the expense code screen from the Field Sales Expense Data Entry screen, type "Y" in the Expense Code field and press [ENTER].
   - To scroll through the list of codes, press [ENTER].
   - You may exit the screens at any time by typing "Y" in the TERMINATE field
2. The system returns to the Field Sales Expense Data Entry screen. The SC may continue to enter data where they left off.

51846 7511

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

■ **Expense Code Inquiry - Method 2**

Used to obtain the codes when expenses NOT being entered:

1. From the Sales Expense Main Menu, type 09 at the prompt and press [ENTER].
   - Press [ENTER] to scroll to next page.
   - Type "999" at prompt to return to Main SES menu.

51846 7512

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Analysis Code Inquiry

At times, the SC may need to access a listing of current Analysis Codes available to the Field.

```
GFJ199IN          F I E L D   S A L E S   E X P E N S E          05/13/93
                              ANALYSIS CODES

CODE    DESCRIPTION                 CODE    DESCRIPTION

000 REGULAR REPORT                  621 PSS TRAINING
001 DRIVE UNASSIGNED CAR            651 HAND HELD COMPUTER
601 TRNG PROG (FIELD)               652 FORMS/TOOLS
602 PILOT SEMINAR                   653 MFM
603 SALES MGMT DEV.PROG.            654 S/R ORIENTATION TOB
604 NAMA OR WEST'N NAMA             655 PROGRAM REVISIONS
605 FMI CONVENTION                  656 TRAINERS EXPENSES
606 RECRUITING, INTERVIE            658 VIDEO TRAINING EQUIP
610 DAKOTA SALES MEETING            659 PERFORMANCE MGT.SEM.
611 FIELD TRAINING SEMIN            660 DALLAS SALES MEETING
613 NATD                            661 S.M.D.P. TRAINING
614 AMOA                            662 PSN
617 ORAL PRESENTATION               671 SIS OFFICE TRAINING

PRESS ENTER TO DISPLAY NEXT SCREEN OR 'Y' TO TERMINATE: _
```

As with an Expense Code Inquiry, there are two methods to obtaining this list:

- **Analysis Code - Method 1**

Utilize this method when information is needed WHEN AN EXPENSE REPORT IS CURRENTLY BEING PROCESSED.

1. To access from the Field Sales Expense Data Entry screen, type "Y" in the Analysis Code field and press [ENTER].
   - Press [ENTER] to scroll through the screens.
   - The SC may exit at any time by typing "Y" in the TERMINATE field and press [ENTER].
2. The system will return to the Field Sales Expense Data Entry screen. The SC may continue data entry.

51846 7513

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

■ **Analysis Code - Method 2**

Used to obtain the codes when expenses are NOT being entered.

1. From the Sales Expense Main Menu, type "10" at the prompt and press [ENTER].
2. Once the Analysis Code Inquiry screen is displayed, utilize the steps on the previous page to move through the system.

Car Master Screen

To inquire on an individual car listed on the multi-selection screen, place the cursor at ENTER DESIRED CAR NUMBER and enter the car number you wish to view (must be the car number listed on that screen or the system will not allow you to view the car number entered) and press END. The system will display the INDIVIDUAL SELECTION screen.

To terminate or exit the INDIVIDUAL SELECTION screen, place the cursor at the field TERMINATE LIST (Y = YES, DEFAULT = NO) and enter "Y". The system will return you to either the Main Menu screen or the Multi-Selection screen depending on how you obtained the INDIVIDUAL SELECTION screen.

```
CRM072MN          V E H I C L E   R E P L A C E M E N T          05/13/93
              SPECIFY DUE DATE 021993     REMAINING SPECIFY DAYS
               1). CAR MASTER INQUIRY
               2). CHANGE VEHICLE ASSIGNMENT
               3). NEW VEHICLE (PRESPEC) DESCRIPTION
               4). NEW VEHICLE (PRESPEC) DESCRIPTION PRINT
               5). REQUISITION VEHICLE
               6). CANCEL REQUISITION
               7). CHANGE VEHICLE REQUISITION
               8). REQUISITION INQUIRY
               9). REQUISITION PRINT
              10). CONFIRM QUOTE
              11). QUOTE INQUIRY
              12). QUOTE PRINT
              13). DELIVERY/DEALER INQUIRY
              14). ASSIGN DRIVER UPON DELIVERY
              15). SPECIAL ACCESSORIES BY STATE INQUIRY
              16). NOTE INQUIRY
              17). NOTE ADD
              99). RETURN TO FIELD OFFICE MAIN MENU
              SELECT FUNCTION FROM ABOVE: __          REGDIV 6326
```

All functions available via this screen are covered in Book III - Vehicle Administration, Chapter 9.

51846 7514

© R.J. Reynolds Tobacco Company 1993

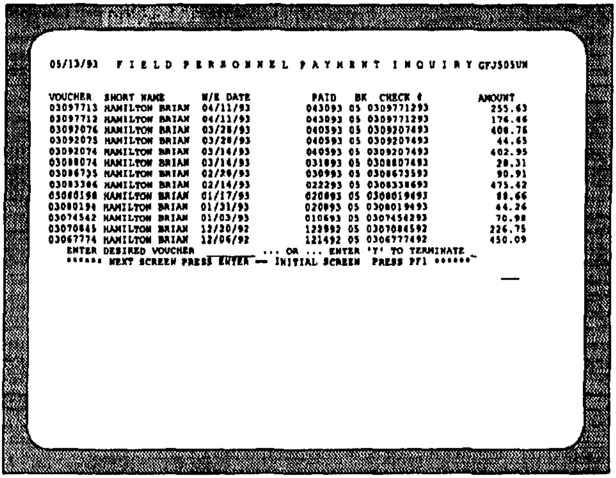
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Field Personnel Payment History

The SC may be called upon to access the Accounts Payable Payment History of an individual employee or operating unit. Use these steps:

Viewing for Employee

1. From the Sales Expense Main Menu, type "12" at the prompt and press [ENTER].
2. The system will request the SC to enter the employee number. Enter the number and press [ENTER]. The following screen will be displayed.



05/13/93 FIELD PERSONNEL PAYMENT INQUIRY GFJS05UN

VOUCHER	SHORT NAME	W/E DATE	PAID	BK	CHECK #	AMOUNT
03097713	HAMILTON BRIAN	04/11/93	043093	05	0309771293	255.63
03097712	HAMILTON BRIAN	04/11/93	043093	05	0309771293	176.46
03092076	HAMILTON BRIAN	03/28/93	040593	05	0309207493	408.76
03092075	HAMILTON BRIAN	03/28/93	040593	05	0309207493	44.65
03092074	HAMILTON BRIAN	03/14/93	040593	05	0309207493	402.95
03088074	HAMILTON BRIAN	03/14/93	031893	05	0308807493	28.31
03086735	HAMILTON BRIAN	02/28/93	030993	05	0308673593	90.91
03083386	HAMILTON BRIAN	02/14/93	022293	05	0308338693	475.42
03080198	HAMILTON BRIAN	01/17/93	020893	05	0308019493	88.66
03080194	HAMILTON BRIAN	01/31/93	020893	05	0308019493	44.26
03074542	HAMILTON BRIAN	01/03/93	010693	05	0307454293	70.98
03070845	HAMILTON BRIAN	12/20/92	122992	05	0307084592	226.75
03067774	HAMILTON BRIAN	12/06/92	121492	05	0306777492	450.09

ENTER DESIRED VOUCHER ________ ... OR ... ENTER 'Y' TO TERMINATE

****** NEXT SCREEN PRESS ENTER — INITIAL SCREEN PRESS PF1 ******

3. Following are descriptions of fields on this screen:
   - **VOUCHER** - This is the voucher number assigned by Accounts Payable when the expense was paid.
   - **NAME** - This is the name of the person being paid.
   - **W/E DATE** - This is the week ending date of the expense report paid by that voucher.

51846 7515

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **PO NUMBER** - The first three positions are the analysis code that was keyed for the expense report being paid. The last six positions are the batch number that the expense report was assigned to when keyed into the salesperson's Expense System.
- **PAID** - This is the date the voucher (expense report) was paid.
- **BK** - This is the bank code for the bank making the payment.
- **CHECK NUMBER** - This is the check number the voucher was paid against.
- **AMOUNT** - This is the amount paid for that voucher (expense report).

4. If multiple screens exist for the employee account number entered, simply press [END] to see the next screen of vouchers. If you wish to see the previous screen again, press [PF1] and the previous screen will be displayed.

5. If you wish to display the detail information for an individual voucher, place the cursor at the ENTER DESIRED VOUCHER, key the voucher and press [END]. The Field Personnel Inquiry screen will be displayed. To exit this screen, enter a "Y" in TERMINATE and press [END].

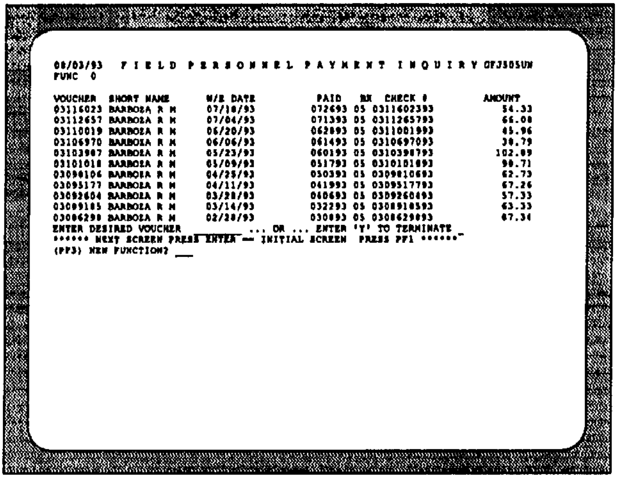
51846 7516

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Viewing for Region/Division

1. From the Sales Expense Main Menu, type "12" at the prompt and press [ENTER].

2. Press [END]. The system will request you to enter a Region/Division, the following screen will be displayed.



```
08/03/93   F I E L D  P E R S O N N E L  P A Y M E N T  I N Q U I R Y OFJ505UN
FUNC  0

VOUCHER  SHORT NAME      W/E DATE           PAID   BK  CHECK #          AMOUNT
03116023 BARBOZA R M     07/18/93           072693 05 0311602393         54.33
03112657 BARBOZA R M     07/04/93           071393 05 0311265793         66.08
03110019 BARBOZA R M     06/20/93           062893 05 0311001993         45.96
03106970 BARBOZA R M     06/06/93           061493 05 0310697093         38.79
03103987 BARBOZA R M     05/23/93           060193 05 0310398793        102.89
03101018 BARBOZA R M     05/09/93           051793 05 0310101893         98.71
03098106 BARBOZA R M     04/25/93           050393 05 0309810693         62.73
03095177 BARBOZA R M     04/11/93           041993 05 0309517793         67.26
03092604 BARBOZA R M     03/28/93           040693 05 0309260493         57.33
03089185 BARBOZA R M     03/14/93           032293 05 0308918593         63.33
03086298 BARBOZA R M     02/28/93           030893 05 0308629893         87.34
ENTER DESIRED VOUCHER ________ ... OR ... ENTER 'Y' TO TERMINATE _
****** NEXT SCREEN PRESS ENTER — INITIAL SCREEN  PRESS PF1 ******
(PF3) NEW FUNCTION? ___
```

3. All vouchers within the Region/Division entered will be displayed. If multiple screens exist, press [ENTER] to see the next screen. On the last screen display the system will tell you at the top of the screen that there is no more data to display for the Region/Division. Field description are:

- **VOUCHER** - This is the number assigned by Accounts Payable for that expense report.
- **VENDOR** - This is the same as employee account number.
- **NAME** - This is the name for that salesperson's employee account number.
- **SVAP** - These are codes used by Accounts Payable.
- **YR** - This is the year the voucher entered the A/P system.

51846 7517

© R.J. Reynolds Tobacco Company 1993

- **INVOICE** - Will always be blank.
- **GROSS** - Total amount of the voucher.
- **TMS** - Code used by Accounts Payable.
- **PAYDATE** - Date the voucher (expense report) was paid.
- **NET** - Total amount of the voucher.
- **PUR ORD** - The last 1-6 numbers displayed is the batch number assigned by the Sales Expense System at the time the expense report was keyed.
- **PROCESSED** - This is the date the expense report was entered.
- **CHECK NO** - This is the check number assigned to the voucher at the time of payment.
- **W/E DATE** - This is the week ending date of the voucher at the time of payment.
- **FULL NAME** - This is the complete name of the salesperson being paid.
- **G/L CODE** - This is the general ledger code assigned to that expense item.
- **UNITS** - The first four positions are the Region/Division entered at the time the expense report was keyed. The last three positions are the actual expense code entered for the dollar amount. If the expense report is pulled for the batch number indicated, the items listed should be in sequence as entered on the expense report.
- **AMT** - This is the dollar amount entered on the expense report for the expense code.

4. If more expense items exist for the voucher than will fit on one display screen, you may see the next screen of items by pressing [ENTER] with nothing keyed in RETURN at the bottom of the screen.

5. To return to the previous screen, key "P" in RETURN. Key "M" in RETURN to return to the Main Menu. To check the detail information for that voucher, press [PF1].

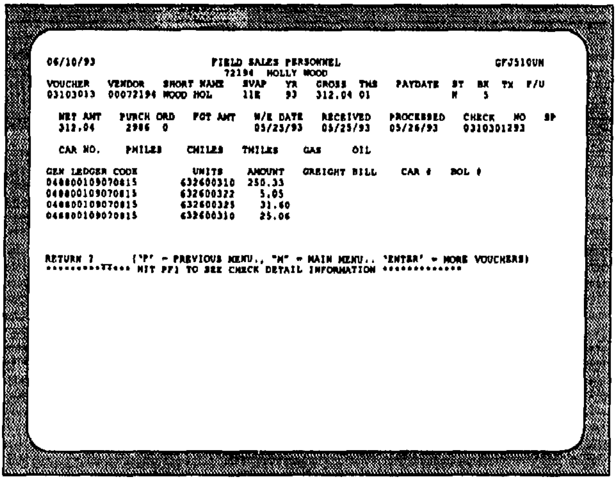
51846 7518

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Check Detail Information Screen

1. Press [PF1] to see the Check Detail Information screen. This screen displays all vouchers with their dollar amounts that were paid against the check number of the detail voucher being review.



```
06/10/93                FIELD SALES PERSONNEL                    GFJ510UN
                          72194  HOLLY WOOD
VOUCHER   VENDOR   SHORT NAME  SVAP   YR   GROSS  THS   PAYDATE  ST  BK  TX  F/U
03103013  00072194 WOOD HOL    11E    93   312.04 01             N   5

  NET AMT  PURCH ORD  FGT AMT  W/E DATE  RECEIVED  PROCESSED  CHECK   NO   SP
  312.04    2986  0            05/23/93  05/25/93  05/26/93   0310301293

  CAR NO.   PMILES   CMILES  THILES   GAS   OIL

GEN LEDGER CODE          UNITS      AMOUNT  GREIGHT BILL   CAR #  BOL #
048800109070815          632600310  250.33
048800109070815          632600322    5.05
048800109070815          632600325   31.60
048800109070815          632600310   25.06


RETURN ?      ('P' - PREVIOUS MENU., "M" - MAIN MENU.. 'ENTER' - MORE VOUCHERS)
**********??*** HIT PF1 TO SEE CHECK DETAIL INFORMATION *************
```

2. Valid fields include:
   - **PAYEE NO** - This is the employee account number.
   - **PAYEE NAME** - This is the employee being paid.
   - **CHECK NO** - This is the check number expenditures were paid against.
   - **CHECK AMT** - This is the amount of the voucher being paid.
3. To exit this screen, enter a "Y" in the TERMINATE field and press [ENTER]. The system will return you to Payment Detail Inquiry screen.

51846 7519

© R.J. Reynolds Tobacco Company 1993

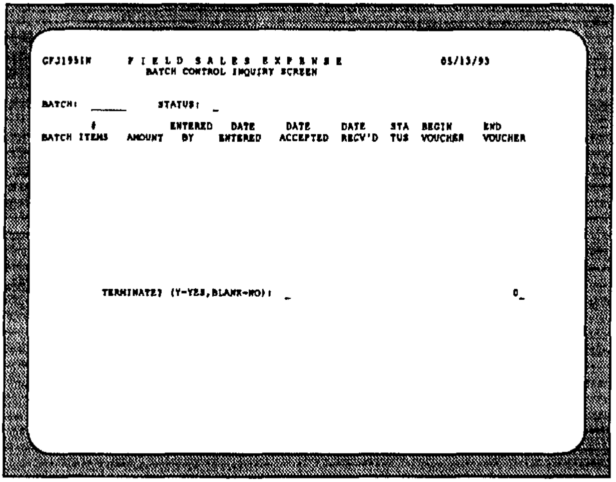
Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Batch Control Inquiry

This function is used to inquire about batches of expense reports within the system for determining the status of the expense reports.

1. Enter "13" in the ENTER SELECTION FROM ABOVE field and press [ENTER].

2. The following screen will be displayed. The system will only allow you to review the batches you have clearance to view, based on access codes. If your access code is for a Regional Area or Office, you may have access to all batches for Field Offices within your Region and Area.



3. You can use this screen in three ways:

- 1 - Type the desired number in the BATCH field and press [ENTER]. The batch and all batches with succeeding numbers on the file will be displayed.

- 2 - Type the desired status code in the STATUS field and press [ENTER]. Any batch on the system with the batch status code that was entered will be displayed. Valid batch status codes include:

  - 1 = Unreleased Batch (open item)
  - 2 = Canceled/Deleted Batch
  - 3 = Approved for Payment

51846 7520

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- 4 = All backup documents received
- 6 = Audited and documents received
- 7 = Payment made by Accounts Payable

- 3 - Type the batch number in the BATCH field and the status code in the STATUS field and press [ENTER]. That batch and all batches with succeeding numbers on the file equal to the status code entered will be displayed.

4. To exit the system, type "Y" in the TERMINATE field and press [ENTER].

5. The following error message may be displayed on this screen:

No Records Found	No batches of expense reports can be displayed based on system access code of user.

51846 7521

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Employee Master Inquiry

This function allows access to the Employee Master by either Region/Division or individual employee account number.

1. Enter "14" in the ENTER SELECTION FROM ABOVE field and press [ENTER].
2. The system will prompt you for either the employee number or Region/Division number.
3. If you enter the employee number, the following screen will be displayed.

```
GFJ033IN            F I E L D   S A L E S   E X P E N S E              05/13/93
                           EMPLOYEE ACCOUNT INQUIRY

        EMP:   72194  HAMILTON BRIAN K
        SS#: 490820280  EMPTYPE  : W ( WEEKLY  )  EMPSTATUS : A ( ACTIVE )
        R/D:  6326       PRIOR R/D:  6539           TERMINATED:
        FSOF:      750.00   JOB CODE ;  14328       CAR# ASSIGNED:  20562
        PMILES:      1,378 CMILES :          420    TMILES:      12,368
        TRANSFER DATE:           ACCIDENTS:  2      VEH AGRMNT Y 910110
        SECTION CODE:

                ***** ADDRESS INFORMATION *****

                4474 FAWN RIDGE TRAIL
                EAGAN                      MN   55123

           TO TERMINATE INQUIRY, PRESS THE ENTER KEY
```

4. All detail information about the employee will be displayed. To exit this screen, enter a "Y" in TERMINATE and press [ENTER].

51846 7522

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

5. If you enter a Region/Division code, the following screen will be displayed.

```
GFJ034IN          F I E L D  S A L E S  E X P E N S E          05/13/93
                     ALL EMPLOYEES FOR A REG/DIV

 EMP#  R/D  NAME                       CITY           ST  ZIP     STAT
 51191 6326 SHILDEN D                  MAPLE GROVE    MN 55369     A W
 65801 6326 ANDERSON THEODORE          KIMBALL        MN 55353     A W
 67873 6326 LINDGREN VIRJEAN           BLOOMINGTON    MN 55431     A W
 69286 6326 GOUDREAULT THOMAS          MINNEAPOLIS    MN 55419     A W
 69557 6326 GUNDERSON PAUL             PLYMOUTH       MN 55441     T W
 69926 6326 SMITH PAMELA               BLOOMINGTON    MN 55437     T W
 71456 6326 HUGHESDON HAROLD           NEW LONDON     MN 56273     A W
 71474 6326 CONDON ELEANOR             MINNEAPOLIS    MN 55416     T W
 72194 6326 HAMILTON BRIAN             EAGAN          MN 55123     A W
 72659 6326 SPELTZ JOHN                WINONA         MN 55987     T W

FOR NEXT SCREEN, PRESS ENTER WITH FIELDS BLANK

ENTER 'Y' TO TERMINATE: _  OR ENTER DESIRED EMPLOYEE #: ______
```

6. This screen displays all employees within that Region/Division. If more than one page of information is available, press [ENTER] to page through the listing.

7. To inquire on an individual employee number, place the cursor on the ENTER DESIRED EMPLOYEE field and enter the employee number and press [ENTER]. The system will display the employee account screen.

8. To exit this screen, enter a "Y" in the TERMINATE field and press [ENTER].

51846 7523

 © R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

Field Personnel Mileage History

This function allows access to the Mileage History File by employee account.

1. Enter "15" in the ENTER SELECTION FROM ABOVE field and press [ENTER].

2. The system will prompt you for the employee account number. Enter the number and press [ENTER]. The following screen will be displayed:

```
GFJ600IN          F I E L D  S A L E S  E X P E N S E          05/13/93
                           MILEAGE INQUIRY

   TOT P.MILES     2,828   DEDUCT AMT     395.92   ALLOW AMT
   TOT C.MILES       804   DEDUCT AMT              ALLOW AMT

EMP#  72194 HAMILTON BRIAN K     DIV 6326 JOB 14328 TYPE W STATUS: A

  WE     TO             * PERSONAL MILEAGE *    * COMMUTING MILEAGE *
 DATE  PAYROLL VOUCH MILES DEDUCT    ALLOW   MILES  DEDUCT   ALLOW
930509         100613   112   15.68
930425         100612    63    8.82                 24
930411 930508 097713
930328 930411 092075                                36
930314 930327 088074                                48
930228 930313 086735   910  127.40                  48
930214 930227 083386    20    2.80                  48
930131 930213 080194   120   16.80                  72
930117 930213 080198
930103 930116 074542    96   13.44                  48
      *** MORE MILEAGE TO DISPLAY ***, PRESS ENTER
```

3. The system will display all mileage (both personal and commuting) for the past year for the employee.

4. Field descriptions include:

- **TOP P MILES** - Total personal miles via expense reports for the past year.
- **DEDUCT AMT** - Total deduction taken from payroll check for the personal miles listed for that year.
- **ALLOW AMT** - Total allowance amount paid via payroll check for the personal miles listed for that year.

51846 7524

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000

- **TOTAL C MILES** - Same as personal miles except totals are for commuting miles.
- **EMP#/NAME** - This is the employee name and account number.
- **DIV** - This is the employee's current Region/Division.
- **JOB** - This is the job code assigned to that employee.
- **TYPE** - "W" is weekly and "M" is monthly.
- **STATUS** - "A" means active and "T" means terminated.
- **WE DATE** - This is the expense report week ending date the mileage is for.
- **TO PAYROLL** - This is the date the deduction was sent to Payroll to be deducted.
- **VOUCHER** - This is the voucher number assigned by SES at the time the expense report was approved for payment.
- **MILES** - These are the total miles (either personal or commuting) entered on the expense report for that week ending date.
- **DEDUCT** - This is the total payroll deduction (either personal or commuting) calculated for the miles entered for that expense report.
- **ALLOW** - This is the total allowance amount paid (either personal or commuting) via payroll for the miles entered for that expense report.

5. To exit this screen, place a "Y" in the TERMINATE field and press [ENTER].

51846 7525

© R.J. Reynolds Tobacco Company 1993

Source: https://www.industrydocuments.ucsf.edu/docs/yhky0000